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Advertising Age®

Crain's International Newspaper of Marketing. In Two Sections. Section 1.

# Buy-fest: Networks may grab $3 billion in upfront

By VERNE GAY

NEW YORK—The network TV upfront market exploded last week.

At least 12 major ad agencies initiated or completed long-term deals with the Big 3 networks for prime-time positions in the 1987-88 TV season. Both buyers and sellers believe the advance sales will reach $3.2 billion, or $700 million more than the 1986-87 upfront market. That represents a 28% increase.

NBC-TV is expected to close in on $1 billion in prime-time sales as early as today, equaling last year's upfront total, agency sources said. ABC-TV and CBS-TV each expects to surpass $1 billion in sales for the first time when the market concludes later this summer.

Neither network ever has surpassed $900 million in prime-time upfront sales.

If NBC sells out all its advance time this week, as some industry executives expect, it would be the quickest upfront sales pace ever established by a major network.

Others contend it is unlikely NBC will shut its doors to advertisers now. However, pricing could be expected to climb dramatically on the top-rated network this week and after.

If the inflation pattern in the upfront market continues, as expected, the average prime-time unit cost—a 30-second spot—this fall could reach $136,000, ADVERTISING AGE estimates indicate, or 15% over the average unit cost for last fall.

Advertisers traditionally purchase their TV commercial inventory for the fourth quarter and the first three quarters of the succeeding year by July 4, the upfront buying period. They do this to secure "guarantees," or assurances that ratings goals will be met, and to get better pricing than they can in the short-term, or "scatter," market.

But this year's results are shoving aside projections:

- The single biggest factor behind the '87-88 bull market has been an influx of small advertisers. An estimated 225 individual advertisers are in the upfront market. Last year, between 99 and 125 bought upfront. Many of the new, smaller spenders generally worked the scatter market last year. By going upfront, they are hoping to escape the huge price escalations that plagued the scatter market the first two quarters of this year.
- The networks are getting advertisers to accept cost-per-thousand price increases of, on average, more than 20% ahead of last season's levels, agency executives said.

NBC won increases of as much as 30%, sources said. Young & Rubicam, which was the first big buyer this year, reportedly agreed to increases of 19% to 22% two weeks ago, and now that looks like a bargain.

The people meter, which in tests has shown lower viewing levels than the soon-to-be-phased-out diary-based system of A.C. Nielsen Co., contributed to the price increases.

These lower meter results added a substantial "artificial" increase in buyers' cost-per-thousand. With lower audience levels, advertisers are, in effect, subject to a price "increase" when data show lower viewing levels.

These current buys have as much as a 10% "increase" built in, sources said.

Although the upfront market is extremely strong, that does not guarantee ad spending

(Continued on Page 85)

# WPP link to Saatchi irks clients

By LAUREL WENTZ

LONDON—Unilever and Procter & Gamble Co. appear to be increasingly concerned over Saatchi & Saatchi's 7% stake in WPP Group, which is about to purchase JWT Group.

"Of course there is some concern about the Saatchi investment in WPP, and we would prefer that it did not exist," said a spokesman at the London headquarters of Unilever, a JWT client in 25 countries. Saatchi & Saatchi is one of P&G's major agencies.

"However, it is extremely unlikely to affect our long-standing business relationship with JWT," the spokesman said. "We've been with JWT almost man and boy. All you can do is express some concern and hope something can come about."

The Unilever spokesman implied that if P&G expressed a similar concern about Saatchi's involvement with WPP, a Saatchi divestment of its WPP stock could become an issue.

A key source told ADVERTISING AGE that Saatchi & Saatchi is

**Is JWT getting ready to lose BK?—Page 84.**

under heavy pressure from P&G to sell its WPP stock. Both S&S and P&G declined to comment officially.

Unilever also is concerned that JWT's client service may be eroded by cutbacks, the company spokesman said. This concern has been exacerbated by WPP Group Chairman Martin Sorrell's reputation as a finance-oriented agency executive.

"What we use JWT for is the quality of service from the agency," the Unilever spokesman said. "If Mr. Sorrell is going to bring agency profitability up, we'd obviously be interested in knowing how and that it's not going to affect quality. For all we know, Mr. Sorrell will be a shot in the arm for JWT."

N.V. Philips, a JWT client in 13 countries, has expressed the same concern about client service.

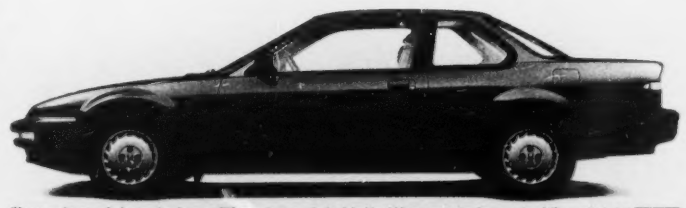
Philips is reviewing its $20 million account with JWT in Europe and Latin America.

The marketer is talking with JWT but has asked for proposals from its other international agencies—Ogilvy & Mather, SSC&B:Lintas Worldwide and BBDO Worldwide.

These anxieties are surfacing as WPP nears completion of its

(Continued on Page 84)

A new sports event.



The same plan: a new body, a new steering, a new Zillion engine, a new 4-wheel double wishbone suspension. Are you a player? The new Prelude S.

Honda first out with '88s

American Honda Motor Co. introduces the first 1988 import car this week with a $10 million campaign for the Prelude. Four-wheel steering, a feature that is very popular in Japan, will be an option of the Prelude. See story on Page 3.

## Last Minute News

### Quaker may sue over Total claims

CHICAGO—Quaker Oats Co. is considering suing Minneapolis-based General Mills, whose new vitamin-fortified Total Oatmeal boasts an on-pack nutritional comparison with Quaker *(see related story on Page 3)*. Saatchi & Saatchi DFS Compton, New York, handles Total Oatmeal. Quaker declined comment on the report. In 1975, Quaker lodged a complaint with the National Advertising Division of the Council of Better Business Bureaus when Total cold cereal launched a similar comparative campaign against Quaker's 100% Natural Cereal.

### JWT to lay off 30 in Frisco

SAN FRANCISCO—J. Walter Thompson USA is about to lay off 30 workers in its office here in the wake of the loss of a major segment of its Chevron business *(see related story on this page)*, reliable sources said. Company officials denied any decisions had been made about personnel changes.

### Mars pulls DoveBar from Zechman

BURR RIDGE, ILL.—Mars Inc.'s Dove International unit dismissed Zechman & Associates, Chicago, from the $3 million DoveBar account, saying it wants an "international agency." The Forever Yours and Rondos assign-

(Continued on Page 8)

Sues over research forecasts

# Beecham vs. Saatchi

By STEWART ALTER

NEW YORK—Beecham Inc. is suing Saatchi & Saatchi Co.'s research unit, Yankelovich, Skelly & White/Clancy, Shulman, for more than $24 million, claiming over-optimistic forecasts induced the marketer to introduce Delicare Cold Water Wash, a detergent for delicate fabrics.

Beecham alleges it would not have introduced Delicare last year if the researcher had not projected the product could dislodge American Home Products Corp.'s Woolite as the No. 1 brand in the cold-water-wash segment.

The case could have broad implications for the industry if it is held that market research companies generally are liable for the accuracy of their projections.

The suit, filed in U.S. District Court here, also contends Saatchi & Saatchi's purchase of Yankelovich, Skelly & White contributed to Beecham's problems by fostering a "management malaise."

It charges negligence, negligent misrepresentation, professional malpractice and breach of contract.

The suit alleges that, without YSW/CS' projections and rec-

(Continued on Page 86)

# Highlights


**Weight Watchers gets mean on lean** 4

It's not over till the skinny lady sings. That's the new philosophy of Foodways National, marketer of Weight Watchers frozen entrees. Weight Watchers is coming on strong in the diet-food wars. In 1984, Stouffer Foods' Lean Cuisine outsold Weight Watchers 3-to-1. Now, Weight Watchers has built strength through 46 consecutive monthly share gains and stands just 2 share points behind its rival, 11% to 13%.

**ARCO to pump methanol in California** 12

Atlantic Richfield Co. is entering a rare alliance with a state agency to test-market a methanol-based fuel as a gasoline substitute. The petroleum company, known for its aggressive and innovative marketing programs, this year will sell M85 fuel—comprising 85% methanol and 15% premium unleaded gasoline—at some of its stations in southern California.

**Coors challenges alcohol act** 27

Adolph Coors Co. is challenging federal labeling restrictions to advertise beer as a "beverage of moderation." But at least one rival suggests Coors' real motivation is to combat its nagging image as "weak" beer. Coors, the nation's fifth-largest brewer, filed suit July 2 in U.S. District Court in Denver, challenging the constitutionality of the Federal Alcohol Administration Act prohibition against stating alcohol content on beer labels or in advertising.

**Ice cream makers won't chill out** 32

The Donvier ice cream maker, the originator of no-fuss homemade frozen concoctions, is feeling the chill from hot competition. Nordic Ware's Supremer Ice Creamer and Salton's Big Chill are putting the pressure on Donvier in mass-merchandise and department stores. Donvier, responding to the new threats to its estimated $35 million in annual sales, has doubled its ad budget this summer to $3 million by turning to network TV and magazines.

**Dakin makin' holiday push** 75

R. Dakin & Co. is lining up its stuffed troops for a holiday battle in the $1 billion plush-toy market. The company will recruit its heaviest hitter—a boxing glove-clad Garfield the cat—for a $1.5 million pre-Christmas TV campaign aimed at increasing brand recognition among young mothers. Spots will include the theme "Dakin makin' friends."

**Untouchables star backs INS** 87

As Eliot Ness, Robert Stack was bad news for gangsters, but this week the former star of TV's "The Untouchables" has some helpful words for employers of immigrants. Mr. Stack stars in both paid and public service TV spots warning employers they must comply with the controversial immigration law passed by Congress last year and enacted in May.


## INTERNATIONAL


**Parker Pen in the black** 49

Parker Pen Ltd., under new ownership and with a new advertising approach, is finding black ink again. The former Parker executives who bought the Parker Pen Co. pen business in January 1986 say they have turned a $500,000 loss in fiscal 1986 into a $23.4 million pretax profit for the fiscal year that ended last February.

**Agency business restructuring** 64

Events of the past 18 months, culminating in London-based WPP Group's recent agreement to purchase JWT Group, point to a very obvious conclusion: internationalization has restructured the advertising agency business with fury and speed.


## OTHER NEWS

Disney characters will pop up this month to promote Delta Air Lines' designation as the official carrier of Walt Disney World. The centerpiece of Delta's estimated $3 million campaign is the airline industry's first "pop-up" ad, featuring 1½-inch-high Disney characters with the Magic Kingdom castle in the background. Page 26.

The Big 3 TV networks are freshening up their veteran series for the fall A.C. Nielsen Co. ratings wars. Besides preparing their new series, the nets are making changes to renewed shows, mostly cast additions and new story line directions. Page 80.

*Changing Times* hopes a humorously innovative TV campaign will help change its image and low profile. A 30-second spot is meant to get readers and the advertising community to see the monthly in its contemporary focus, and increase awareness. Page 69.

Borden's acquisition this month of Snacktime Co., Indianapolis, is the company's latest step in a plan to improve its position against Frito-Lay, which dominates the $7 billion salty-snack market. Snacktime is Borden's second salty-snack company acquisition in the Midwest, a region where Borden has been weak. Page 75.

## SPECIAL REPORT

***Sports Marketing***—*There are two outs, bottom of the ninth, man on third . . . and the viewer retires both sides. The overabundance of sports programming has hurt sports media as viewers turn off and advertisers turn their budgets aside. New players are working their way into the sports media lineups, taking advantage of the game's changing rules. Special Report examines the shifts in the sports media marketplace and agencies' and advertisers' reactions to them. Starts after Page 46.*

## REGULAR FEATURES


| | | | | | |
|---|---|---|---|---|---|
| ACCOUNT CHANGES | 28 | FOR THE RECORD | 83 | PUBLIC RELATIONS BEAT | 37 |
| ADWHIRL | 88 | FORUM | 18 | REGIONAL NEWS | 66 |
| BACK PAGES | 32 | GARFIELD | 45 | THE NEXT TREND | 38 |
| BRADY | 38 | GLOBAL GALLERY | 44 | U.S. NEWSWATCH | 4 |
| BRADY'S BUNCH | 69 | LETTERS | 20 | WORDS | 45 |
| CHRISTOPHER | 31 | McKINNEY | 45 | WORLD NEWS ROUNDUP | 3 |
| CON-SID-ERATIONS | 16 | MEDIA PEOPLE | 28 | | |
| CORRECTIONS & CLARIFICATIONS | 6 | MEDIAWORKS | 72, 74 | FIGURES TO FILE | |
| CURRENTS | 40 | NEW PRODUCT ROUNDUP | 37 | | |
| DIRECT MARKETING | 68 | OBITUARIES | 27 | ADVERTISING PAGES IN FARM PUBLICATIONS, FIRST HALF, '87 | 47 |
| DM BRIEFS | 68 | PEOPLEWORKS | 70 | NEWSPAPER ADVERTISING INCHES, APRIL 1987-86 | 36 |
| EDITORIAL | 16 | PHOTO REVIEW | 71 | | |
| | | PRESSTIME | 8 | | |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# Irangate airline hopes agency can lift image

By MAUREEN GLABMAN

MIAMI—The airline that Lt. Col. Oliver North used to deliver missiles to Iran has doubled its advertising budget in a move to improve its image.

Southern Air Transport, a cargo carrier, handed Tinsley Advertising the $400,000 account with instructions to distance its name from the Iran-contra scandal and the Central Intelligence Agency.

**Lt. Col. Oliver North's** use of Southern Air Transport to deliver missiles to Iran has created an image problem for the airline.

The CIA once owned the airline, said Bill Kress, Southern's administrator for corporate communications and advertising.

Southern has flown since 1947 and is owned by James Bastian, a Miami attorney who also is its chairman. The airline's shaky reputation stems from its ownership by the CIA from 1962 until 1973 and from Mr. Bastian's willingness in recent years to accept offbeat U.S. government work.

Among the airline's credits are its servicing of Gene Hasenfus' plane in Miami en route to Nicaragua prior to Mr. Hasenfus' capture by the Sandinistas.

But Southern, with 28 cargo planes in its fleet, also has moved zoo animals, delivered relief supplies to earthquake and famine victims, carried Mercedes-Benz and Rolls-Royce automobiles to African kings and, last October, transported a plane load of greyhound dogs from Boston to Venezuela.

The airline even hauled King Kong over Wilmington, N.C., in last year's box office flop, "King Kong Lives."

"People expect we're a ramshackle air carrier with all of our employees hiding behind dark glasses," Mr. Kress said. "We want to turn our image around in the minds of those who read business journals."

For more than three years, the airline had used a small Miami agency, Jean Wescourt Advertising, spending $200,000 on ads in such publications as *Air Cargo News* and *Aviation Week*. Now Southern plans to spend $400,000 in *The Wall Street Journal* and other national business publications this fall.

The ads, said agency Chairman Sandy Tinsley, will emphasize the airline's experience in transporting large items. The campaign won't mention the Iran-contra scandal, she said.

"We know a lot of ceos have heard our name," Mr. Kress said. "We're going to capitalize on that to form the correct image for ourselves."

Mr. Kress said during the initial agency discussion the company played with the idea of promoting its missile shipment work with a slogan, "Southern moves anything."

However, Mr. Kress said, that idea never made it to the chairman's desk.#

# Woolworth unit picks Italia shop

CITY OF INDUSTRY, CALIF.—Holtzman's Little Folk Shop, a division of F.W. Woolworth Co., hired Los Angeles-based Italia & Associates for its $5 million retail account, previously handled in-house.

The company, which operates 300 Kids Mart stores in the western and southern U.S., plans to add 150 stores nationwide in 1988. Advertising spending will jump 20% at that time.

Italia, an agency specializing in retail accounts, also picked up Chatsworth-based Public Image, a 12-store off-price retailer specializing in young men's apparel, to its roster. The account was previously unassigned.

**ZZZZ Best Co.**, Reseda, Calif., which filed for Chapter 11 bankruptcy protection last week amid allegations that founder Barry Minkow defrauded the company, has shelved plans to continue TV spots featuring the flamboyant Mr. Minkow. Agency Pearlman/Wohl/Oldshever/Marchese, Los Angeles, said the retail carpet-cleaning service had been on a regular advertising hiatus before the allegations came to light. ZZZZ Best had been spending $2 million annually in nine California markets.

## West Coast News

**Chiat/Day** named Peter deVaux, 42, senior VP-chief operating officer, based in Los Angeles. Mr. deVaux formerly was senior VP-finance at Young & Rubicam, New York. He succeeds Steve Hunt, who left.

**Evans/Kraft**, Seattle, named Lon LaFlamme, 38, president of its three-office network. He previously was exec VP-director of client services. Mr. LaFlamme succeeds Donald Kraft, 60, who becomes chairman and remains ceo.#

# Christopher

## 'Ms.'-givings over celebration

By MAURINE CHRISTOPHER

"Let the celebration begin," *Ms.*, a leading voice of feminism, trumpets in the introduction to its 230-page, 15th anniversary issue.

M. Christopher

I started flipping through, hoping for inspiration to shake women and their millions of male supporters out of their lethargy and spur them to action on crucial areas for them and the country.

Like a homework assignment, I read practically everything—from the Chevrolet Beretta gatefold ad for sporty motoring, through the Charlie fanny-patting Revlon ad, to the More cigarettes back page with a striking woman seeking "more cigarettes, more pleasure" despite the bold warning against the link to lung cancer, heart disease, emphysema and difficult pregnancies.

By the end, despite the optimistic results of a superficial survey of the mood of 200 women and 100 men, I was convinced women will have to look elsewhere for direction in pinpointing achievable goals, developing workable strategy and finding future leaders not associated with past disappointments. After the Equal Rights Amendment fiasco, new generals must be found.

Late at night when I accidently tuned in Gloria Steinem, co-founder and editor of *Ms.*, on the radio, plugging her special issue and the Henry Holt book, "Letters to *Ms.*," I felt even less like celebrating. She said victory in some areas may be 100 years away.

Ms. Steinem could be right if women reinforce the worst stereotypes about them by concentrating on the matters that take up a good deal of the milestone issue of a magazine that has been a trailblazer in its best moments.

Note the titles from the index. How about these pieces for tranquilizers? "A Global Click?" (Who in the family is going to do the laundry and cleaning?) "The Marriage Trap." "Teen Lust." "The F Word." "Sister/Friends." "Best Girl Friends." And the "15 Dumbest Men in America."

One writer felt triumphant now that women as well as men are listened to during the conversation at dinner parties. Oh, glory be.

I suggest the type of women *Ms.* is trying to sell to advertisers—"opinion makers," Ms. Steinem called them on the "Casper Citron Show" on WMCA-AM—might have been expecting attention and analyses on more pressing problems, such as:

- The diversion of billions to the military while families and singles are left to deal with unemployment, catastrophic medical costs and the shortage of childcare facilities.
- Mothers' anger at having to produce the sons that are sacrificed to foreign policy while having little, if any, influence over that policy.
- The danger that women in their child-bearing years again may lose control over their own bodies if the anti-abortion crusaders win.
- Lax enforcement of equal-employment opportunity laws and the disparity between what men and women are paid.

The July-August special does have an excellent article by Angela Bonavoglia about Pamela Rae Stewart, who is being sued in California for giving birth to a brain-dead son.

Otherwise, the most interesting reading for me came in the samples from "Letters from *Ms.*" A 73-year-old Philadelphia writer theorized ERA failed because farm women were never mobilized for the fight.

Also in "Letters," a Maine reader wrote: "What disappoints me most is that women in the U.S. have not organized sufficiently to put more women in government and key decision-making positions in the military. Women are absent from areas where their presence would humanize decisions."

Unfortunately, the lead celebrities featured in quickie interviews in letters are women no longer in power: Bella Abzug, former congresswoman; Carol Bellamy, former president of the New York City Council; and Gerry Ferraro, who must wish she had never heard of Walter Mondale.

The most disconcerting note of all: *Ms.* wraps up by exhorting readers to send money—$1,000—for a tax-deductible lifetime subscription. On the late-night radio show, Ms. Steinem said her magazine is "not in the black but is not losing such large sums of money" as other magazines. She put her losses over 15 years at less than $4 million. She estimated *Esquire* lost $26 million in a much shorter period and cited reports that *Vanity Fair's* red ink is running at about $40 million.

By contrast, according to the cofounder, readership and circulation are trending the right way for her. Advertiser guarantee rate base is 450,000. Ms. Steinem said she and her colleagues may relinquish their foundation status to become a profit maker by mounting a paid advertising and promotion campaign for *Ms.*#

# Tobacco takes dip

## Smokeless '86 sales slide 6.2%

By JOHN C. MAXWELL JR.

The big news in the sagging smokeless tobacco area is Pinkerton Tobacco Co. starting a new-product segment with its chewable Masterpiece Tobacs.

This new, gumlike product is unlike anything on the market today.

Masterpiece Tobacs, which comes in peppermint and cinnamon flavors, does not prompt the need to spit.

There are six units per foil-blister pack and three foil packs per box. The box looks something like a hard pack of cigarettes.

Each piece is hexagonal and weighs about 1.2 grams.

The product will retail at about $1.25 to $1.45, depending on state and local taxes, and is in the process of going into test (AA, May 11).

Smokeless tobacco units overall were down 6.2% in 1986, the largest decline in recent history. The previous year marked the first decline—off by about 1%.

This acceleration has come about because of the labeling regulations and taxation on the industry, as well as the bad press due to the supposed adverse effect that chewing tobacco has on the user.

We think this type of outlook will continue, so we anticipate further declines in the industry for the foreseeable future.

All sections of the industry declined, particularly plug, down 14%, and moist plug, down 13.7%.

Moist snuff and fine cut were down only a little more than 3%.

The main factor in the industry, loose leaf, was down in line with the industry, dropping 6.4%.

These trends, of course, had various ramifications for the individual companies.

Richmond, Va.-based Pinkerton, which has more than 80% of its volume in loose leaf, had the biggest share decline, down some 1.4 share points.

However, the company maintained its No. 3 position within the industry.

Greenwich, Conn.-based U.S. Tobacco Co., which is preponderantly in moist snuff and fine cut, gained 0.8 of a share.

Memphis, Tenn.-based Conwood Co., the industry leader, with items in most product areas, also was the leader in share gains, up some 0.9 Conwood gained share pretty much across the board, up one share point in loose leaf, 0.3 in moist cut and fine cut, three share points in moist plug and 0.65 in plug.

The company maintained share in twist roll and lost slightly in the dry snuff area.

We believe this industry will continue to be under pressure from the Surgeon General and others, and basically will have a downward momentum that we also see in the other tobacco areas.#

*Mr. Maxwell is with Furman Selz Mager Dietz & Birney, New York.*

### Total smokeless tobacco

Source: John C. Maxwell Jr.

| Brand | 1984 Lbs. | 1984 Share | 1985 Lbs. | 1985 Share | 1986 Lbs. | 1986 Share |
|---|---|---|---|---|---|---|
| Conwood | 36,990 | 27.4 | 38,429 | 28.7 | 37,133 | 29.6 |
| U.S. Tobacco | 35,341 | 26.2 | 36,457 | 27.3 | 35,254 | 28.1 |
| Pinkerton | 28,690 | 21.3 | 35,129* | 26.3 | 31,300 | 24.9 |
| Lorillard | 11,914 | 8.8 | 11,593 | 8.7 | 10,401 | 8.3 |
| Helm Tobacco | 10,694 | 7.9 | 9,825 | 7.3 | 9,260 | 7.4 |
| R.J. Reynolds | 8,411 | 6.5 | — | — | — | — |
| Brown & Williamson | 1,790 | 1.3 | 1,594 | 1.2 | 1,462 | 1.2 |
| R.C. Owen | 767 | 0.6 | 712 | 0.5 | 672 | 0.5 |
| Total | 134,921 | 100.0 | 133,739 | 100.0 | 125,482 | 100.0 |

*Alfred & Christian & Peterson acquired RJR trademarks in November 1985 and licensed them to Pinkerton. Pound figures are listed in thousands.

## Sugar group backs logo

WASHINGTON—The Sugar Association this month breaks advertising and promotional campaigns tied to its Sugermark logo, via North Castle Partners, Greenwich, Conn.

The advertising campaign is print only. The promotional campaign is for a contest for consumers to write a slogan for the logo.#

# New Product Roundup

*The following reports cover new-product introductions and product-line extensions.*

### SEASONINGS

MELROSE PARK, ILL.—**Alberto-Culver Co.** next month introduces nationally Mrs. Dash sodium-free seasoning convenience packs with a $1 million print campaign via Grey Advertising, Chicago.

### LAUNDRY PRODUCTS

CARLSTADT, N.J.—**Airwick Industries** is testing liquid Lavender Sachet fabric softener in Northeastern markets as well as Dallas, Miami and the Carolinas. The product, part of a line that Airwick acquired from Bismarck, N.D.-based Gold Seal Co., is being advertised via 30 and 60-second TV spots that broke June 30 and free standing inserts distributed earlier in the month. Bloom Agency, New York, handles.

### CIGARETTES

WINSTON-SALEM, N.C.—**R.J. Reynolds Tobacco USA** moved a lights version of its highly successful More cigarettes into test July 1 in western markets. More Lights 120s will deliver 12 milligrams of tar vs. the 17-milligram tar level of the mother brand, which has racked up a 1.4% share of market, or about $280 million in annual sales, since it was introduced in 1975. The new cigarettes are being marketed in western states including Arizona, Colorado, Montana and Wyoming. The rollout is supported by outdoor, magazine and point-of-purchase advertising, as well as by in-store promotion and couponing. Young & Rubicam, New York, handles.#

When your clients programs include loose-leaf binders...

then it warrants the very best.

A Peterson Case® takes you away from the ordinary.

A Peterson Case® identifies a uniquely constructed cover. It is an electronically sealed, turned edge, supported vinyl product which affords a rugged durability and exceptionally fine appearance. It can always be identified by the debossed line around the periphery of the lining which is a distinctive feature and has become a trademark of The Peterson Case®.

Many loose-leaf manufacturers incorporate "The Peterson Case®" in their "top-of-the-line" loose-leaf binders.

Ask your usual source for a sample or write to:

VINYL CASE DIVISION
Peterson Electronic Die Co., Inc.
199 Liberty Avenue
Mineola, N.Y. 11501
516-747-3835

# Newspaper Advertising SAU Inches in the MRCS

## April 1987 vs. April 1986

### AKRON, OH

| | 1987 Full Run | 1987 Part Run | 1986 Full Run | 1986 Part Run |
|---|---|---|---|---|
| Beacon Journal (E) | 103,431 | — | 92,860 | — |
| Beacon Journal (S) | 69,109 | — | 69,355 | — |
| Grand Total | 172,540 | — | 162,215 | — |

*NOTE: Part run figures not available.*

### ALLENTOWN, PA

| | | | | |
|---|---|---|---|---|
| Call (M) | 172,416 | — | 168,069 | — |
| Call (S) | 76,692 | — | 78,147 | — |
| Grand Total | 249,108 | — | 246,216 | — |

*NOTE: Part run figures not available.*

### ASBURY PARK, NJ

| | | | | |
|---|---|---|---|---|
| Press (E) | 215,950 | 34,605 | 204,994 | 25,738 |
| Press (S) | 141,345 | 19,430 | 137,378 | 14,281 |
| Grand Total | 357,295 | 54,035 | 342,372 | 40,019 |

### ATLANTA, GA

| | | | | |
|---|---|---|---|---|
| Constitution (M) | 186,860 | 83,928 | 173,807 | 59,824 |
| Journal (E) | 183,629 | 83,860 | 171,575 | 65,562 |
| Journal & Constitution (S) | 121,933 | 47,456 | 129,633 | 44,641 |
| Journal & Constitution (Sat) | 48,283 | — | 43,714 | — |
| Grand Total | 540,705 | 215,244 | 518,729 | 170,027 |

*NOTE: Constitution Morning and Journal Evening published five days a week only.*

### BALTIMORE, MD

| | | | | |
|---|---|---|---|---|
| Sun (M) | 148,983 | 12,126 | 131,582 | 4,355 |
| Sun (E) | 130,523 | 12,117 | 107,401 | 4,367 |
| Sun (S) | 151,920 | 44,379 | 138,468 | 38,989 |
| Grand Total | 431,426 | 68,622 | 377,451 | 47,711 |

### BERGEN COUNTY, NJ

| | | | | |
|---|---|---|---|---|
| Record (E) | 167,849 | 28,712 | 161,903 | 21,799 |
| Record (S) | 142,478 | 47,741 | 131,874 | 45,453 |
| Grand Total | 310,327 | 76,453 | 293,777 | 67,252 |

### BOSTON, MA

| | | | | |
|---|---|---|---|---|
| Herald (M) | 88,757 | — | 63,359 | — |
| Herald (S) | 23,598 | 48,953 | 18,575 | 34,807 |
| Globe (M) | 151,609 | 19,706 | 139,699 | 14,499 |
| Globe (S) | 196,689 | 44,067 | 184,876 | 29,321 |
| Grand Total | 460,653 | 112,726 | 406,509 | 78,627 |

### BUFFALO, NY

| | | | | |
|---|---|---|---|---|
| News (AD) | 116,278 | 21,533 | 115,366 | 13,862 |
| News (S) | 69,242 | 25,553 | 70,749 | 14,800 |
| Grand Total | 185,520 | 47,086 | 186,115 | 28,662 |

### CAMDEN, NJ

| | | | | |
|---|---|---|---|---|
| Courier-Post (E) | 140,559 | 22,859 | 139,038 | 23,944 |
| Courier-Post (S) | 61,630 | 18,879 | 57,249 | 10,784 |
| Grand Total | 202,189 | 41,738 | 196,287 | 34,728 |

### CHARLOTTE, NC

| | | | | |
|---|---|---|---|---|
| Observer (M) | 129,318 | — | 127,633 | — |
| Observer (S) | 69,967 | — | 71,387 | — |
| Grand Total | 199,285 | — | 199,020 | — |

*NOTE: Part run figures not available.*

### CHICAGO, IL

| | | | | |
|---|---|---|---|---|
| *Tribune (M) | 125,632 | 259,858 | 120,684 | 256,250 |
| *Tribune (S) | 126,161 | 100,206 | 123,033 | 113,276 |
| Sun-Times (M) | 138,889 | 92,433 | 132,962 | 85,260 |
| Sun-Times (S) | 55,132 | 47,095 | 63,555 | 28,258 |
| Grand Total | 445,814 | 529,592 | 440,234 | 483,044 |

*NOTE: Tribune figures supplied by Media Records. 1987 figures represent advertising for 3/30/87 to 4/26/87.*

### CINCINNATI, OH

| | | | | |
|---|---|---|---|---|
| Enquirer (M) | 160,876 | 8,101 | 173,889 | 8,399 |
| Enquirer (S) | 130,756 | 12,510 | 135,941 | 11,435 |
| Post (E) | 77,413 | 23,972 | 84,601 | 17,560 |
| Grand Total | 369,045 | 44,583 | 394,431 | 37,394 |

### CLEVELAND, OH

| | | | | |
|---|---|---|---|---|
| Plain Dealer (M) | 140,174 | 39,777 | 145,009 | 41,918 |
| Plain Dealer (S) | 107,626 | 11,338 | 114,676 | 7,743 |
| Grand Total | 247,800 | 51,115 | 259,685 | 49,661 |

### DALLAS, TX

| | | | | |
|---|---|---|---|---|
| News (M) | 277,140 | 13,406 | 285,284 | 12,276 |
| News (S) | 143,599 | 12,724 | 173,288 | 11,996 |
| Times-Herald (AD) | 225,150 | 26,703 | 227,134 | 45,355 |
| Times-Herald (S) | 108,674 | 14,034 | 115,878 | 17,233 |
| Grand Total | 754,563 | 66,867 | 801,584 | 86,860 |

### DENVER, CO

| | | | | |
|---|---|---|---|---|
| Rocky Mt. News (M) | 263,352 | 3,127 | 265,738 | 2,241 |
| Rocky Mt. News (S) | 86,339 | 691 | 90,770 | 54 |
| Post (M) | 186,057 | 32,795 | 195,938 | 7,024 |
| Post (S) | 113,582 | 1,132 | 110,406 | 1,615 |
| Grand Total | 649,330 | 37,745 | 662,852 | 10,934 |

### DETROIT, MI

| | 1987 Full Run | 1987 Part Run | 1986 Full Run | 1986 Part Run |
|---|---|---|---|---|
| Free Press (M) | 102,471 | 55,979 | 98,297 | 34,935 |
| Free Press (S) | 45,414 | 34,848 | 45,724 | 31,471 |
| News (AD) | 157,788 | 50,904 | 181,299 | 44,719 |
| News (S) | 86,331 | 34,413 | 94,971 | 45,417 |
| Grand Total | 392,004 | 176,144 | 400,291 | 156,542 |

### ESCONDIDO, CA

| | | | | |
|---|---|---|---|---|
| Times-Advocate (E) | 104,389 | 3,159 | 104,612 | 4,705 |
| Times-Advocate (S) | 39,556 | — | 40,173 | 1,479 |
| Grand Total | 143,945 | 3,159 | 144,785 | 6,184 |

### FORT LAUDERDALE, FL

| | | | | |
|---|---|---|---|---|
| News & Sun-Sentinel (S) | 108,773 | — | 106,193 | — |
| Sun-Sentinel (M) | 279,739 | — | 277,768 | — |
| Grand Total | 388,512 | — | 383,961 | — |

*NOTE: Part run figures not available. Morning figures include the Saturday Edition.*

### FORT WAYNE, IN

| | | | | |
|---|---|---|---|---|
| Journal Gazette (M) | 88,120 | — | 82,314 | — |
| Journal Gazette (S) | 65,088 | — | 81,866 | — |
| News Sentinel (E) | 92,795 | — | 90,135 | — |
| Grand Total | 246,003 | — | 254,315 | — |

*NOTE: Part run figures not available.*

### GREENWICH/STAMFORD, CT

| | | | | |
|---|---|---|---|---|
| Time (E) | 86,734 | 4,348 | 81,470 | 329 |
| Time (S) | 67,371 | 2,110 | 61,510 | 645 |
| Advocate (E) | 114,232 | 19,476 | 106,611 | 15,445 |
| Advocate (S) | 65,772 | 4,131 | 59,855 | 645 |
| Grand Total | 334,109 | 30,065 | 309,446 | 17,064 |

### HARTFORD, CT

| | | | | |
|---|---|---|---|---|
| Courant (M) | 159,049 | 44,694 | 153,898 | 34,223 |
| Courant (S) | 83,760 | 141,060 | 81,465 | 125,049 |
| Grand Total | 242,809 | 185,754 | 235,363 | 159,272 |

### HONOLULU, HI

| | | | | |
|---|---|---|---|---|
| Advertiser (M) | 123,932 | — | 121,862 | — |
| Star-Bulletin (E) | 116,602 | — | 120,031 | — |
| Star-Bulletin & Advertiser (S) | 78,165 | — | 72,982 | — |
| Grand Total | 318,699 | — | 314,875 | — |

### HOUSTON, TX

| | | | | |
|---|---|---|---|---|
| Chronicle (AD) | 212,144 | 40,420 | 230,015 | 48,163 |
| Chronicle (S) | 113,281 | 31,877 | 110,192 | 27,845 |
| Post (M) | 143,824 | 48,619 | 172,651 | 33,012 |
| Post (S) | 70,078 | 22,379 | 66,350 | 31,179 |
| Grand Total | 539,327 | 143,295 | 579,208 | 140,199 |

### LONG BEACH, CA

| | | | | |
|---|---|---|---|---|
| Press Telegram (M) | 118,063 | 49,777 | 106,950 | 44,938 |
| Press Telegram (S) | 57,118 | 1,977 | 56,746 | 74 |
| Grand Total | 175,181 | 51,754 | 163,696 | 45,012 |

### LONG ISLAND, NY

| | | | | |
|---|---|---|---|---|
| Newsday (E) | 119,613 | 134,242 | 147,507 | 98,843 |
| Newsday (S) | 85,904 | 100,361 | 102,379 | 95,105 |
| Grand Total | 205,523 | 234,603 | 249,886 | 193,948 |

### LOS ANGELES, CA

| | | | | |
|---|---|---|---|---|
| Times (M) | 294,700 | 301,492 | 287,933 | 262,140 |
| Times (S) | 167,908 | 84,504 | 167,104 | 96,631 |
| Herald-Examiner (M) | 64,501 | 9,920 | 54,777 | 8,325 |
| Herald-Examiner (S) | 16,282 | 8,040 | 14,462 | 8,290 |
| Grand Total | 543,391 | 403,956 | 524,276 | 375,386 |

### LOS ANGELES/SAN FERNANDO VALLEY, CA

| | | | | |
|---|---|---|---|---|
| News (M) | 193,847 | 37,594 | 205,487 | 30,638 |
| News (S) | 79,137 | 540 | 82,505 | 755 |
| Grand Total | 272,984 | 38,134 | 287,992 | 31,393 |

### *LOS ANGELES/TORRANCE, CA

| | | | | |
|---|---|---|---|---|
| Breeze (E & S) | 200,321 | — | 209,264 | — |
| Grand Total | 200,321 | — | 209,264 | — |

*NOTE: Figures supplied by publisher to Media Records.*

### *MEMPHIS, TN

| | | | | |
|---|---|---|---|---|
| Commercial Appeal (M) | 144,475 | 111,941 | 126,758 | 89,252 |
| Commercial Appeal (S) | 90,271 | 5,812 | 88,361 | 11,440 |
| Grand Total | 234,746 | 117,753 | 215,119 | 100,692 |

*NOTE: Figures supplied by publisher to Media Records.*

### MIAMI, FL

| | 1987 Full Run | 1987 Part Run | 1986 Full Run | 1986 Part Run |
|---|---|---|---|---|
| Herald (M) | 159,476 | — | 159,664 | — |
| Herald (S) | 92,069 | — | 95,503 | — |
| News (E) | 55,231 | — | 57,168 | — |
| Grand Total | 306,776 | — | 312,335 | — |

*NOTE: Part run figures not available.*

### MINNEAPOLIS, MN

| | | | | |
|---|---|---|---|---|
| Star & Tribune (AD) | 120,256 | 28,615 | 108,033 | 24,427 |
| Star & Tribune (S) | 116,985 | 6,465 | 149,457 | 2,340 |
| Star & Tribune (Sat) | 26,748 | — | 25,092 | 182 |
| Grand Total | 263,989 | 35,080 | 282,582 | 26,949 |

### *NASHVILLE, TN

| | | | | |
|---|---|---|---|---|
| Banner (E) | 112,887 | — | 119,493 | — |
| Tennessean (M) | 112,758 | — | 116,924 | — |
| Tennessean (S) | 92,361 | — | 84,993 | — |
| Grand Total | 318,006 | — | 321,410 | — |

*NOTE: Figures supplied by publisher to Media Records.*

### NEW BRUNSWICK, NJ

| | | | | |
|---|---|---|---|---|
| Home News (E) | 94,461 | 4,369 | 98,359 | 2,052 |
| Home News (S) | 69,003 | 13,576 | 71,877 | 5,361 |
| Grand Total | 163,464 | 17,945 | 170,536 | 7,413 |

### NEW YORK, NY

| | | | | |
|---|---|---|---|---|
| Times (M) | 183,128 | 21,140 | 175,865 | 21,503 |
| Times (S) | 189,914 | 115,435 | 212,033 | 112,738 |
| News (M) | 63,921 | 93,356 | 61,094 | 95,931 |
| News (S) | 38,976 | 75,954 | 35,726 | 77,505 |
| Post (AD) | 64,479 | 1,216 | 57,294 | 1,174 |
| Grand Total | 540,418 | 307,101 | 542,012 | 308,851 |

### NEWARK, NJ

| | | | | |
|---|---|---|---|---|
| Star Ledger (M) | 215,660 | 5,372 | 215,089 | 7,027 |
| Star Ledger (S) | 184,010 | 31,271 | 179,737 | 29,769 |
| Grand Total | 399,670 | 36,643 | 394,926 | 36,796 |

### OAKLAND, CA

| | | | | |
|---|---|---|---|---|
| Tribune (M) | 81,932 | 95,884 | 76,665 | 94,220 |
| Tribune (S) | 35,598 | 40,866 | 42,955 | 33,052 |
| Grand Total | 117,530 | 136,750 | 119,620 | 127,272 |

### OCEANSIDE, CA SAN DIEGO COASTAL NORTH COUNTY

| | | | | |
|---|---|---|---|---|
| Blade-Tribune (E) | 98,761 | 7,417 | 98,180 | 4,548 |
| Blade-Tribune (S) | 39,221 | 2,350 | 42,068 | — |
| Grand Total | 137,982 | 9,767 | 140,248 | 4,548 |

*NOTE: Blade-Tribune Evening published five days a week only.*

### ORANGE COUNTY, CA

| | | | | |
|---|---|---|---|---|
| Register (AD) | 310,260 | 104,086 | 308,724 | 83,601 |
| Register (S) | 127,114 | 535 | 117,027 | 8,925 |
| Grand Total | 437,374 | 104,621 | 425,751 | 92,526 |

### PHILADELPHIA, PA

| | | | | |
|---|---|---|---|---|
| Inquirer (M) | 151,581 | 31,187 | 165,766 | 35,019 |
| Inquirer (S) | 128,379 | 71,312 | 121,658 | 57,623 |
| News (E) | 79,158 | 3,477 | 83,046 | 4,730 |
| Grand Total | 359,118 | 105,976 | 370,470 | 97,372 |

### *PHOENIX, AZ

| | | | | |
|---|---|---|---|---|
| Arizona Republic (M) | 230,292 | 13,671 | 234,205 | 13,050 |
| Arizona Republic (S) | 138,438 | — | 151,701 | — |
| Gazette (E) | 221,702 | 13,918 | 224,165 | 13,068 |
| Grand Total | 590,432 | 27,589 | 610,071 | 26,118 |

*NOTE: Figures supplied by publisher to Media Records.*

### *PROVIDENCE, RI

| | | | | |
|---|---|---|---|---|
| Journal (M) | 90,946 | 84,252 | 81,011 | 64,887 |
| Journal (S) | 104,119 | 92,327 | 97,209 | 41,433 |
| Grand Total | 195,065 | 176,579 | 178,220 | 106,320 |

*NOTE: Figures supplied by publisher to Media Records.*

### *ST. LOUIS, MO

| | | | | |
|---|---|---|---|---|
| Post Dispatch (M) | 110,047 | 41,069 | 110,646 | 35,517 |
| Post Dispatch (S) | 124,867 | — | 123,293 | — |
| Grand Total | 234,914 | 41,069 | 233,939 | 35,517 |

*NOTE: Figures supplied by publisher to Media Records.*

### ST. PAUL, MN

| | | | | |
|---|---|---|---|---|
| Pioneer Press Dispatch (AD) | 93,171 | — | 90,533 | — |
| Pioneer Press Dispatch (S) | 111,457 | — | 93,487 | — |
| Grand Total | 204,628 | — | 184,020 | — |

*NOTE: Part run figures not available.*

### SAN ANTONIO, TX

| | | | | |
|---|---|---|---|---|
| Express-News (AD) | 112,499 | 44,432 | 115,993 | 43,363 |
| Express-News (S) | 73,752 | 26,828 | 74,266 | 26,885 |
| Express-News (Sat) | 32,266 | — | 36,665 | — |
| Light (AD) | 132,131 | 29,598 | 119,112 | 38,664 |
| Light (S) | 85,990 | 5,632 | 75,662 | 16,398 |
| Light (Sat) | 24,468 | 1,731 | 29,586 | — |
| Grand Total | 461,106 | 108,221 | 451,284 | 125,310 |

*NOTE: Express-News All Day and Light All Day published five days a week only.*

### SAN DIEGO, CA

| | 1987 Full Run | 1987 Part Run | 1986 Full Run | 1986 Part Run |
|---|---|---|---|---|
| Union (M) | 221,869 | 39,403 | 208,718 | 24,521 |
| Union (S) | 116,654 | — | 119,161 | — |
| Tribune (E) | 232,722 | 40,291 | 223,175 | 25,467 |
| Grand Total | 571,245 | 79,694 | 551,054 | 49,988 |

### SAN FRANCISCO, CA

| | | | | |
|---|---|---|---|---|
| Chronicle (M) | 129,217 | 73,044 | 128,888 | 76,029 |
| Examiner (E) | 125,752 | 79,720 | — | — |
| Examiner & Chronicle (S) | 74,031 | 28,600 | 75,327 | 36,819 |
| Grand Total | 329,000 | 172,364 | 204,215 | 112,848 |

*NOTE: 1986 Examiner Evening figures not available.*

### SAN JOSE, CA

| | | | | |
|---|---|---|---|---|
| Mercury News (AD) | 292,750 | 24,346 | 289,734 | 29,913 |
| Mercury News (S) | 139,206 | — | 141,532 | — |
| Grand Total | 431,956 | 24,346 | 431,266 | 29,913 |

### *STATE COLLEGE, PA

| | | | | |
|---|---|---|---|---|
| Centre Times (E) | 94,838 | 7,860 | 84,237 | 3,794 |
| Centre Times (S) | 32,618 | 339 | 32,468 | 574 |
| Grand Total | 127,456 | 8,199 | 116,705 | 4,368 |

*NOTE: Figures supplied by publisher to Media Records.*

### *TOLEDO, OH

| | | | | |
|---|---|---|---|---|
| Blade (E) | 114,889 | — | 108,536 | — |
| Blade (S) | 93,446 | — | 99,342 | — |
| Grand Total | 208,335 | — | 207,878 | — |

*NOTE: Figures supplied by publisher to Media Records.*

### WASHINGTON, DC

| | | | | |
|---|---|---|---|---|
| Post (M) | 279,931 | 45,524 | 264,514 | 43,818 |
| Post (S) | 150,715 | 41,744 | 150,042 | 40,826 |
| Grand Total | 430,646 | 87,268 | 414,556 | 84,644 |

### WASHINGTON, DC SUBURBAN GROUP

| | | | | |
|---|---|---|---|---|
| Montgomery Journal (M) | 72,466 | 701 | 77,379 | 758 |
| Fairfax Journal (M) | 81,235 | 1,710 | 90,121 | 2,135 |
| Grand Total | 153,701 | 2,411 | 167,500 | 2,903 |

*NOTE: Montgomery Journal Morning and Fairfax Journal Morning published five days a week only.*

### WESTCHESTER ROCKLAND, NY

| | | | | |
|---|---|---|---|---|
| Reporter Dispatch (E) | 108,605 | 27,721 | 89,108 | 9,209 |
| Reporter Dispatch (S) | 80,440 | 19,993 | 85,120 | 17,376 |
| Grand Total | 189,045 | 47,714 | 174,228 | 26,585 |

### WICHITA, KS

| | | | | |
|---|---|---|---|---|
| Eagle-Beacon (M) | 124,890 | — | 126,980 | — |
| Eagle-Beacon (S) | 70,682 | — | 78,326 | — |
| Grand Total | 195,572 | — | 205,306 | — |

*NOTE: Part run figures not available.*

## Source: Media Records

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2. Determine Square Inches of Page.... Multiply Width by Depth Inches.
3. Determine the Number of SAU Inches of Page..... Divide the Square Inches by 2.0625 (SAU Inches).
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Special Report

Mary S. Fluck

# Games remain, but market ho-hums

By Ed Fitch

It might have been one of the best sports battles of the year. It might have rivaled Hagler vs. Leonard, the Mets vs. the Red Sox, Hulk Hogan vs. Andre the Giant. Instead it was more like the second half of Super Bowl XXI. In the end, the Oscars killed 'em.

According to Northbrook, Ill.-based A.C. Nielsen Co. the Academy Awards show drew nearly twice the audience as the March 30 NCAA championship basketball game pitting Indiana University against Syracuse University. During the game's crucial second half, when Chevy Chase was bantering and, of all things, Dom DeLuise and Telly Savalas singing on the Oscars, the score was, Oscars: 30.6 rating, 45 share; NCAA: 16.2 rating, 24 share.

While the NCAA championship game certainly lacks the appeal of the seventh game of the World Series, this rare one-on-one dramatic entertainment vs. sports entertainment should have been called for no contest. Even if the hotly contested Mets-Red Sox World Series was pitted against the Oscars, the game would have gone into extra innings: The Oscars matched the series' prime time seven game average of a 29 rating, 45 share.

Sports programming is not down for the count, however. By May, quite a while since the last whistle blew on the gridiron, ABC's "Monday Night Football" was in Nielsen's top 20 listing of 1986-87 season-to-date prime-time ratings.

But taking a look at National Football League broadcast rights shows just how much the game has changed. While ABC still will broadcast "MNF" next season and CBS and NBC will carry national and regional telecasts, cable network ESPN will carry four preseason contests, the Pro Bowl and eight regular season Sunday night games. This represents the first time NFL broadcast rights have strayed from the cozy con-

(Continued on Page S-2)

**Viewers prefer pigskin**

| | Viewers (millions)* | % of U.S. adults |
|---|---|---|
| 1. Pro football | 63.2 | 37% |
| 2. Baseball | 62.7 | 37 |
| 3. College football | 48.9 | 29 |
| 4. Boxing | 37.2 | 22 |
| 5. College basketball | 36.2 | 21 |
| 6. Pro basketball | 34.7 | 21 |
| 7. Pro wrestling | 28.8 | 17 |
| 8. Bowling | 28.6 | 17 |
| 9. Tennis | 26.3 | 16 |
| 10. Auto racing | 25.8 | 15 |

*Those who frequently or almost always watch
Source: Simmons Market Research Bureau

# Market ho-hums

(Continued from Page S-1)

fines of the networks.

"The TV world is changing in terms of who is carrying sports," says Robert Dowling, president, Westport, Conn.-based *Sports Marketing News*. "Ten years ago, the networks commanded 92% of all viewers, now the percentage is in the low to mid-70s."

As the players have changed, so have the rules.

To overly simplify past practices, the networks would send their bids to the sports' commissioners and, with about as much mystery as Oscar night, the envelopes would be opened and the winners announced.

"[The sport executives] would sit down and say, 'We have this hot property, and you know it's hot, and you're making money off of it, so we're going to charge this much,' " says Bob Iger, VP-programming and rights negotiations, ABC Sports, New York. "I'm not going to say there was no element of negotiation, but the negotiation aspect wasn't so . . . so . . . difficult. The economic circumstances didn't require anything different."

Put simply, everybody was making money hand over fist. Despite paying high rights fees, the networks weren't suffering.

"We were passing some wildly inflated costs on to the advertisers," Mr. Iger says. "We were raking in the bucks, the sports were raking in the bucks."

In 1985, the networks started to realize they would have to trade in their rakes for tweezers. The proliferation of sports on both cable and network TV—the amount of network sports programming increased 63% from 1973 to 1983, according to Paul Kagan Associates, Carmel, Calif.—started to take its toll.

"The bottom fell out because of the proliferation," Mr. Iger says. "Things once considered special no longer were, and ratings slipped." Advertisers' interest tumbled along with the ratings. The networks found themselves locked into long-term contracts on products that would never be profitable.

For example, the three networks lost an estimated $75 million on NFL broadcasts last season. An even more dramatic case is ABC Sports' estimated $600 million, six-year contract with Major League Baseball for "Monday Night Game of the Week," alternating World Series, League Championship Series and All-Star games. The soft market and MLB Commissioner Peter Ueberroth's reported refusal to renegotiate the contract, which doesn't expire until 1989, has analysts saying ABC will lose an estimated $200 million on the package.

Despite some sizable deals, such as the $166 million CBS reportedly paid for the three-year exclusive rights to the NCAA basketball tournament, sports executives are starting to realize they "simply can't demand the same fees," says Mr. Dowling.

The reason is based in simple economics. CBS will pay an average of about $55 million for the rights to the NCAA tourney that culminated in the game that was drubbed by the Oscars in terms of ratings. And although it's only one program vs. an entire tournament, a spokesman for the Academy of Motion Picture Arts & Sciences says ABC paid "considerably less" than $55 million for the Oscars.

The well-publicized management and ownership changes at the networks, placing greater emphasis on the bottom line, are having an effect as well, says Mr. Iger. "Sports is now operated under different business procedures. The mandate is to make money and streamline."

The NFL pact was the first major contract to come under consideration after this reassessment. "All of the networks approached this round of negotiations with essentially the same philosophy," he says.

Val Pinchbeck, New York-based NFL's director-broadcasting, indicates the league was very aware of the changing market. "Art Modell [Cleveland Brown's owner and head of the NFL's negotiating committee] and [NFL Commissioner] Pete Rozell went into the negotiations with the best information possible," he says. "The information previously had been that the networks were making money off of their NFL packages." This time, Mr. Pinchbeck says, they entered the negotiations knowing the rights fees' upward spiral already had hit the ceiling.

In signing a three-year, $1.4 billion contract with the three networks and ESPN, the NFL took a 3.3% decrease in rights fees, a figure Mr. Pinchbeck won't confirm but says is "in the ballpark." The networks' contribution to the billion dollar-plus package was down 15%, according to a network source. ESPN came in off the bench just in time to help offset the NFL's losses.

"This time around ABC, CBS and NBC showed no strong interest in the specials package at the required economic levels," Mr. Pinchbeck says. "This opened up the opportunity for other interested parties to come in. We were able to design a package that met their needs and ours."

Bidding for the prime NFL rights—"MNF," nationally televised games, conference championships and the Super Bowl—should remain competitive because 37% of U.S. adults, or 63.2 million viewers, frequently watch professional football, according to New York-based Simmons Market Research Bureau. Baseball, college football, boxing and college and pro basketball, all of which more than 20% of U.S. adults frequently watch, probably would find themselves on the networks despite the latter's new budget considerations.

"You can probably list on two hands the sporting events TV is willing to pay for," says Mr. Dowling. "Most of the time, the networks say, 'Come to us with a package and a sponsor we can develop a relationship with, and then we'll see if we can get you on the air.' Most events buy their way onto the air."

But Mr. Iger maintains that the era of putting high-ticket sporting events on the air just for their cachet is over. "Some events will not be considered because they are unprofitable."

The networks may have trouble altering the game plan they've played with for so long. Carrying and identifying themselves with certain events and sports are how the networks define themselves, something that tends to artificially inflate the price to score the rights.

Although the rights to the 1988 Winter Olympics were bid on in 1984, Mr. Iger admits they should have seen signs of impending softness and curtailed their spending instincts. Instead the network paid $309 million for the rights to the Calgary games—"way above what even the Olympics can bear"—just before the commencement of the 1984 Winter Olympics in Sarajevo, for which they bid a com-

(Continued on Page S-4)

## Sports programming still special

*Season's highest rated* pro *sporting events*

| Program | Network | Rating |
|---|---|---|
| 1. Super Bowl XXI | CBS | 45.8 |
| 2. World Series, game 7 | NBC | 38.9 |
| 3. World Series, game 6 | NBC | 30.3 |
| 4. World Series, game 5 | NBC | 29.8 |
| 5. NFC Conference Championship | CBS | 27.5 |
| 6. World Series, game 4 | NBC | 26.0 |
| 7. World Series, game 3 | NBC | 25.6 |
| 8. NFC Playoff (49ers-Giants) | CBS | 24.3 |
| 9. NFC Playoff (Redskins-Bears) | CBS | 22.9 |
| 10. NFC Wild Card (Rams-Redskins) | CBS | 21.9 |
| 11. AFC Playoff (Patriots-Broncos) | NBC | 20.4 |
| 12. AFC Playoff (Jets-Browns) | NBC | 19.9 |
| 13. NBA Finals, game 5 | CBS | 18.9 |
| 13. NBA Finals, game 4 | CBS | 18.9 |
| 15. AFC Wild Card (Chiefs-Jets) | NBC | 18.3 |

Source: A.C. Nielsen Co.

## Where the boys—among other things—are

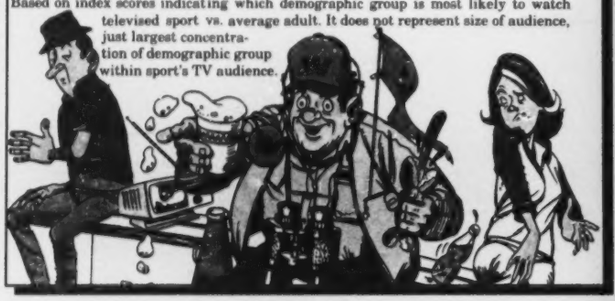
*Most likely viewers*

| Sport | Demographic category | Sport | Demographic category |
|---|---|---|---|
| Drag racing | Men | Golf | White |
| Pro soccer | 18-24 year olds | Pro wrestling | Black |
| Drag racing | 25-34 year olds | Pro soccer | Hispanic |
| Track & field | 35-44 year olds | Tennis | $25,000+ HHI* |
| Horse racing | | Roller derby | $15,000-$24,999* |
| (harness/trotters) | 45-54 year olds | Pro wrestling | less than $15,000* |
| Golf | 55-64 year olds | Tennis | College educated |
| Golf | Married | Drag racing | High school educated |

*Annual household income

Source: Simmons Market Research Bureau.

Based on index scores indicating which demographic group is most likely to watch televised sport vs. average adult. It does not represent size of audience, just largest concentration of demographic group within sport's TV audience.



# *NFL giving Monday its best shot*

New York Giants and Chicago Bears fans will be the first to admit that what goes around comes around. After long years of residing in or near their respective divisions' cellars, the Bears and Giants have ascended to the throne as the undisputed kings of the pigskin. In fact, months before the two teams will square off on the season's first installment of "Monday Night Football," *Inside Sports* ran a cover feature on the Sept. 14 game.

Early publicity of this kind is a windfall for New York-based ABC Sports, which will broadcast "MNF," and the National Football League, which is hoping the networks make money on their football contracts and put rights fee negotiations back on the upward track.

But network and NFL officials will stand right behind Bears and Giants fans in acknowledging the cyclical nature of their fortunes. More than ever, the proposed "MNF" schedule seems designed for the TV ratings game. Fifteen of the 16 scheduled games feature a team that made it to the playoffs last year; 15 games also include at least one team from one of the eight largest U.S. TV markets.

"The top teams just happened to be in major media markets—the Jets, the Giants, the Bears, the Rams, the Raiders," says Val Pinchbeck, director-broadcasting for the New York-based NFL. "It's always been a goal in national games, particularly during prime time, to put together a strong schedule of contenders and major markets."

A spokesman for New York-based ABC Sports says the network is "delighted about the quality of the games scheduled for Monday night." Hopefully, he says, that quality will be reflected in higher ratings and stronger ad schedules. It's difficult to call the "MNF" schedule a success this early in the game. What looks like a sellout game in early April could be a dog by midseason.

Mr. Pinchbeck says despite the abundance of major-market teams on this year's lineup, team performance, not home markets, takes precedence. "We need games of national quality for national telecasts," Mr. Pinchbeck says. "If Pittsburgh and Miami or Tampa Bay and Cincinnati are the top teams, those are the ones people want to see."

He admits to a bit of luck, however, in having contenders in major markets. "If Philadelphia [Eagles] and Detroit [Lions] were doing better, it would be ideal. But these things are cyclical over time, as any New York Giants fan will tell you."

*—Ed Fitch*

## "Monday Night Football" goes big time

| | Market ranking | Number of times on "MNF" |
|---|---|---|
| N.Y. Giants | 1 | 3 |
| N.Y. Jets | 1 | 3 |
| Los Angeles Rams | 2 | 3 |
| L. A. Raiders | 2 | 2 |
| Chicago Bears | 3 | 3 |
| Wash. Redskins | 6 | 2 |
| N. E. Patriots | 8 | 2 |
| Dallas Cowboys | 12 | 3 |
| Cleveland Browns | 22 | 2 |
| Miami Dolphins | 24 | 2 |
| Seattle Seahawks | 25 | 2 |
| Denver Broncos | 26 | 3 |
| San Francisco 49ers | 27 | 2 |

Source (market size): U.S. Dept. of Commerce, Bureau of the Census.

***"Ten years ago, the networks commanded 92% of all viewers, now the percentage is in the low to mid-70s."***

**Robert Dowling**
***Sports Marketing News***

# There's more to marketing than sports

By Pat McGeehan

While we are enamored of sports programming because of its density of our target audience, it is clearly not a must buy for us," says Mark Reiss, director-corporate media, Adolph Coors Co., Golden, Colo. "It is a desired purchase for us, but it doesn't have elements that are so unique that it actually demands our participation."

To hear that kind of talk from any advertiser is bad news for the broadcast and cable sports networks. But Coors is not the only one. Advertisers of all kinds, including those that rely heavily on adult males, have rewritten the rules of the TV sports market.

"For years and years, sports was an automatic buy if you were targeted to men," says Jim Bell, senior VP-group media director at Grey Advertising, New York.

*Pat McGeehan, a former Advertising Age reporter, covered the sporting goods industry and contributed to previous Sports Marketing Special Reports.*

## *There's a new refrain for Coors and others as they find alternatives to reach adult males*

"It no longer is, not even for cars and beer," he says.

Advertisers were willing to pay top dollar for sports because it was considered the most efficient way to reach adult males. Many advertisers didn't see another option.

"What happened was the advertisers began grousing about these huge commitments that they were forced to make by the traditional networks in order to participate," says David Martin, exec VP, Stroh Media Services, Detroit. The networks demanded that advertisers buy a certain number of spots in an event, sometimes requiring them to invest in other, non-sports programs.

Then the networks' sports programming ratings dropped. The pivotal point came in 1984 when the College Football Association argued successfully for the right to cut its own rights deals, breaking up the networks' monopoly. "So there was a ton of college football properties out there; fragmentation occurred," Mr. Martin says.

A proprietary network property suddenly diversified into syndication, regional packages and three-network packages. "It divided up the numbers," he says, "and advertisers said, 'Wait a minute. I've got a tremendous amount of money devoted to

*(Continued on Page S-6)*


CATCH THE MEN YOU WANT WITH NETS, HOOKS AND TRAPS.

Let's face it, the upscale men you're hunting are a different kind of animal. They earn more, spend more and do more. And when it comes to TV, they want more. More sports. So more often than not they're eluding the broadcast networks and being snared by ESPN.®

Night after night, ESPN stops upscale men in their tracks with an endless lineup of live, prime-time excitement. From NHL hockey to CFA college football. From college basketball to golf to tennis to boxing. This year, for the first time, they'll even be watching us for NFL Sunday Night Football.*

And when they're not busy watching, these men are out spending. In fact, they buy 22% more life insurance, 35% more telecommunications equipment and take 35% more business trips than the national average.*

Without ESPN, you're underdelivering this very attractive audience. But you can catch them effectively—for a much lower CPM than the networks—by placing just 10% of your sports budget with us. The results could change the way you spend your ad dollars from now on.

After all, if you're still trying to capture upscale men with the same old network buys, you just might need to change your bait.

ESPN THE TOTAL SPORTS NETWORK®

© 1987 ESPN, Inc. *Nielsen, June '86

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## Ho-hums

*(Continued from Page S-2)*

paratively minor $91.5 million.

NBC was keeping pace, however, offering $304 million, he says. "We had always been an Olympics network and we wanted to go into Sarajevo with the rights to Calgary."

If the same negotiations were being held now, Mr. Iger says, the Games' profit potential would have been the deciding factor. "We'll be looking for sports that have no economic risk because the risk already is covered, or those that offer a guaranteed profit."

The result will be a reassessment of all sports programming. This has opened up the possibility for other eventa to hit the big time, which means making it onto network TV. "We're much more open to new ideas, particularly for corporate-sponsored events," he says, in which sponsors usually commit to a sizable ad schedule, minimizing the network's risk.

"There are a lot of new opportunities in network programming," says Holly Turner, president of Auchincloss & Turner, the sports marketing arm of San Francisco-based Women's Sports Foundation. "There are gaps in their schedules that need to be filled. They are willing to listen to ideas."

The onus is on the program producers, however. "The nets aren't coming to us and saying, 'Give us a program,'" she says. "It depends on those packaging the programming to do something creative and innovative."

Producers should look to play into the trend of network interest in corporate-backed, low-risk programming. "It really helps when you bring in an advertiser they hadn't had before."

ABC's "Wide World of Sports" picked up the WSF's "The Challenge of the Champions" tennis match when WSF signed on Ocean Spray Cranberries as a sponsor. "We brought Ocean Spray to ABC for the first time," Ms. Turner says. "We look to make a marriage between the event, the production, the advertiser, the network."

Now if only the NCAA could play their championship game at the Oscars ceremony with Chevy Chase and Goldie Hawn calling the play-by-play . . . .

# Seoul lament; wrong place, wrong time

By Lori Kesler

In January 1984, ABC agreed to pay a record $309 million for U.S. rights to broadcast the 1988 Winter Games from Calgary. That was the highest price a network ever had bid for an Olympics, more than triple the $91.5 million ABC bid for the Winter Games in Sarajevo, Yugoslavia, and well above the $225 million Los Angeles Summer Games' price tag.

It's understandable, then, that the Seoul Olympic Organizing Committee (SLOOC) expected a huge windfall when it started bargaining in mid-1985 for the 1988 Summer Games. Knowing the Seoul Games would generate nearly twice as much programming as Calgary, SLOOC officials reportedly wanted $1 billion.

But they didn't get it. A lot of things had changed between January 1984 and October 1985, when the SLOOC closed its deal with NBC.

Sarajevo had drawn lower ratings than expected, making TV and ad executives wary despite Los Angeles' success. And some thought Seoul's distant location would create severe time-delay problems.

"We still think it's a problem," says an ABC official. "We felt Calgary was the more viable of the two opportunities."

Seoul's distant location currently is the least of its problems. Because of civil unrest in South Korea, there was speculation at press time that the Olympic Games might be moved to Los Angeles or Moscow, both of which have existing facilities.

■ *Difficult rights talks, civil unrest portend trouble for country that once wanted $1 billion*

The SLOOC experienced another bit of bad timing. The negotiations took place at "the worst possible time for the SLOOC" because CBS was busy fighting Ted Turner and ABC was being taken over by Capital Cities/ABC, says Monica de Hellerman, president of New York-based Sport Summit.

Ironically, the success of the L.A. Games hurt the SLOOC's bargaining power, says Barry Frank, senior group VP, International Management Group, a New York-based sports marketing company. He says shortly after the 1984 Summer Games, the market "went to hell, and it's my theory that L.A. tore it apart."

"Too much money was taken out of the marketplace in a 17-day period," he says. "Suddenly, there was nothing left to invest in the last quarter of '84 and '85."

In the end, the Koreans settled for just $300 million in guaranteed rights fees. They'll also get a percentage of NBC's gross revenues at a certain point above $600 million, but that arrangement likely won't yield any benefits. Current projections call for NBC to take in $600 million on the Olympics; the network says it has sold $350 million in advertising so far.

An NBC official says none of the advertisers have expressed anxiety over the political situation in South Korea. The network, which lost $34 million when the U.S. boycotted the Moscow Games in 1980, is insured for the loss of rights fees and preparation expenses should a problem occur.

ABC admits it will lose millions on the Winter Olympics next year but says it's not giving up on the Games.

"They've been profitable for us in the past and we're confident they'll be profitable in the future," says Larre Barrett, VP-Olympic sales, New York-based ABC Sports.

Since ABC bought the rights to Calgary, a softening market has forced the nets to take a

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## Nets' efforts

*(Continued from Page S-10)*

that the Olympics and election year campaign spots create a surge in network ad sales every fourth year, and 1988 should be no exception if the Olympics generate the $865 million to $965 million predicted.

But that surge in network revenues may not be as big as it appears. Mr. Kostyra estimates the Olympics will add slightly less than 5% to TV's $9 billion market.

Insiders say the rest of the Olympic millions likely would be siphoned from other TV advertising, particularly sports. "It's got to happen," says one TV source. "Some companies have a separate fund for the Olympics, but many will take it right out of their existing budgets."

While flat ad spending and other factors may take a toll, many advertisers will support the Olympics to tie into an event that nourishes patriotism and honors excellence.

And they like the Olympics' TV audience, which splits about evenly between male and female and skews heavily toward the upper-income, harder-to-reach viewer.

"From a sports standpoint, nothing surpasses the Olympics," says Mr. Barrett. "Nothing else delivers the quality and quantity of audience over a period of time."

Mr. Kostyra agrees—to a point. "If Americans win big and win early, the audience will come to the TV set and watch,"


# Our audience buys more sof

30% of all U.S. TV households watch WWF programming every month. That's a lot of thirsty people. They represent more consumers in the prime 12-34 age group than any soft drink can claim.

More good news: Our audience is evenly distributed over A, B and C counties. Household income figures accurately mirror the total U.S. TV audience. And here's the kicker:

We give advertisers more men 18-49 than the average network sports program. And we do it for

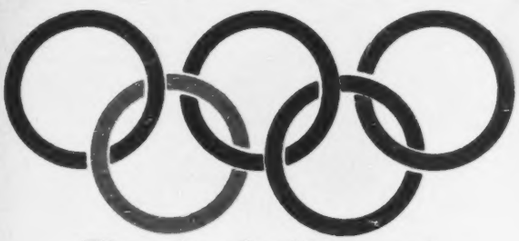
harder line as demonstrated by their negotiations with the National Football League. "You're going to see that same kind of posture for the 1992 Olympics," he says. "Everyone's interested in them, but we'll all be casting a cautious fiscal eye on the rights negotiations."

And this time, the networks will make their bids only after they've assessed 1988. They learned from ABC's experience: The network closed the Calgary deal a month before technical problems and snowstorms poked gaping holes in its coverage at Sarajevo.

Most of 1992's Winter Games in the French Alps and Summer Games in Barcelona, Spain, will be broadcast on a time-delay basis, cutting their value in the U.S., Mr. Barrett says.

Bert Zeldin, New York-based NBC's VP-Olympic sales and marketing, agrees. "There's no way American networks are going to pay as much for taped coverage from Europe," he says.

After 1992, the Olympics will be staggered at two-year intervals, with the next winter competition set for 1994, followed by the Summer Games in 1996. Most observers applaud the move, saying the Games will attract more advertising—and higher TV fees—if they are held in separate years.



## The price of gold tops out

| | Network | Rights fees |
|---|---|---|
| 1988 Summer Games | NBC | $300 million |
| 1988 Winter Games | ABC | $309 million |
| 1984 Summer Games | ABC | $225 million |
| 1984 Winter Games | ABC | $91.5 million |
| 1980 Summer Games | NBC | $87 million |
| 1980 Winter Games | ABC | $15.5 million |

Source: ADVERTISING AGE

### *Olympics starting lineups*

At press time, several major advertisers have signed on with New York-based networks NBC-TV and ABC-TV, including Allied Aftermarket, Anheuser-Busch Cos., Coca-Cola Co., Eastman Kodak Co., Federal Express Corp., Gator Aid, Johnson & Johnson, K mart Corp., McDonald's Corp., Miller Brewing Co. and Visa USA.

NBC also has signed American Gas Association, General Motors Corp., Hyundai Motor America and Isuzu Motors for the Summer Games.

ABC has American Airlines, American Motors Corp., Blue Cross & Blue Shield Associations, Chrysler Corp., Ford Motor Co., E&J Gallo Winery, Merrill Lynch & Co., IBM Corp. and Stanley Tool lined up for Calgary.

he says. "But if Americans aren't winning, the viewers will just turn it off."

Mr. Zeldin says people will tune in to see U.S. and Eastern Bloc athletes square off in the Summer Games for the first time in 12 years. "The Americans won't grab as much gold as they did in L.A.," he says, "but in many instances, that's not important."

Although Mr. Kostyra is confident the Olympics will generate a lot of interest, "advertisers do have concerns. For example, what happens if there are political problems [in the host country] or game delays or transmission difficulties?" Both networks already have covered events at their respective 1988 Olympic sites to reduce the chances for technical foul-ups during the Games.

But even if the transmissions come through loud and clear, advertisers are taking a now familiar stance.

"We just don't know how much the Olympics are going to deliver. Advertisers have gotten burned in the past with Sarajevo and Moscow. They're not exactly negative," he says, "just cautious."


Excellent Demographics...Dynamic Visuals

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- Windsurfers to Maxi's and 12's.
- New events and campaigns including radical technology Formula 40's.
- Television production opportunities.
- Top personalities.

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about one-third the cost. So to add some sparkle to your sponsorship mix, call The World Wrestling Federation at our sales office: 212-593-2228.

Everyone you want is watching us.

WORLD WRESTLING FEDERATION®

# Ad pages in farm publications for 6 months, 1987-86

**Second-quarter and year-to-date figures for U.S. and Canadian publications reporting to Advertising Age**

| | Pages | | | |
|---|---|---|---|---|
| | April-June 1987 | April-June 1986 | Jan.-June 1987 | Jan.-June 1986 |
| **— Canadian —** | | | | |
| Country Guide: | | | | |
| Eastern Edition | 126.9 | 135.6 | 270.0 | 255.6 |
| National Edition | 202.8 | 226.8 | 440.6 | 448.6 |
| Western Edition | 133.5 | 178.3 | 277.4 | 318.4 |
| Le Bulletin des: | | | | |
| Agriculteurs | — | — | — | — |
| Total Group | 463.2 | 540.7 | 988.0 | 1,022.6 |
| % change | | -14.3% | | -3.4% |
| **— Dairy & livestock —** | | | | |
| Beef Today | 48.4 | 30.9 | 94.7 | 61.2 |
| Beef Magazine A. | 114.4 | 101.8 | 240.9 | 271.5 |
| Beefweek | 56.6 | 66.4 | 158.5 | 200.6 |
| The Cattleman | 211.0 | 269.6 | 451.4 | 544.0 |
| Dairy | 60.8 | 74.8 | 143.7 | 159.8 |
| Dairy Today | 78.8 | 57.9 | 135.4 | 107.9 |
| Dairy Herd Management | 47.0 | 35.9 | 88.6 | 83.9 |
| Drovers Journal (21X) A. | 87.5 | 132.5 | 256.4 | 332.5 |
| Feedlot Management | — | — | — | — |
| Florida Cattleman | 136.1 | 176.2 | 301.1 | 373.7 |
| Hoards Dairyman (21X) A. | 121.3 | 124.9 | 258.7 | 297.9 |
| Hogs Today | 41.2 | 32.5 | 96.1 | 79.6 |
| Hog Farm Management | 38.7 | 34.6 | 99.7 | 67.8 |
| National Hog Farmer | 128.9 | 145.5 | 319.9 | 356.0 |
| Pork '87 | 79.5 | 85.1 | 231.4 | 235.3 |
| The Hog Producer | 15.4 | 18.5 | 40.2 | 43.3 |
| S. Beef | — | — | — | — |
| Southern Beef Producer (8X) | — | — | — | — |
| Sunbelt Dairyman (6X) | — | — | — | — |
| Western Livestock Reporter | 87.4 | 98.8 | 210.2 | 233.2 |
| Total Group | 1,353.1 | 1,486.0 | 3,126.9 | 3,448.2 |
| % change | | -8.9% | | -9.3% |
| **— Fruit & vegetable —** | | | | |
| American Fruit Grower | 123.4 | 136.9 | 292.2 | 292.2 |
| American Vegetable Grower | 150.3 | 146.4 | 311.4 | 301.2 |
| Citrus & Vegetable | 129.7 | 138.0 | 289.4 | 290.5 |
| Hay & Forage Grower | 17.7 | — | 59.7 | — |
| The Citrus Industry | — | — | — | — |
| The Grower | 114.9 | 92.5 | 229.9 | 168.1 |
| Total Group | 536.1 | 513.8 | 1,182.6 | 1,052.0 |
| % change | | + 4.3% | | + 12.4% |

| | Pages | | | |
|---|---|---|---|---|
| | April-June 1987 | April-June 1986 | Jan.-June 1987 | Jan.-June 1986 |
| **— General farm publications —** | | | | |
| American Agriculturalist | 65.0 | 65.0 | 143.0 | 154.0 |
| California Farmer (21X) A. | 122.0 | 144.0 | 270.0 | 323.0 |
| Colorado Rancher & Farmer | 54.1 | 71.5 | 125.9 | 176.8 |
| Farm Futures | 81.3 | 98.6 | 271.1 | 267.2 |
| Farm Industry News (10X) | 76.8 | 77.9 | 294.6 | 296.3 |
| Farm Journal (14X) | 135.9 | 118.4 | 415.3 | 384.7 |
| Farmer-Stockman Unit: | | | | |
| Oklahoma Farmer-Stockman (12X) | 59.8 | 53.3 | 110.0 | 102.6 |
| Texas Farmer-Stockman (12X) | 51.4 | 48.9 | 115.8 | 100.7 |
| Florida Grower & Rancher | 59.8 | 84.3 | 138.0 | 174.0 |
| Harvest Publishing Unit: | | | | |
| Kansas Farmer (16X) | 85.4 | 96.0 | 241.4 | 294.7 |
| Michigan Farmer (16X) | 85.3 | 92.8 | 237.0 | 271.4 |
| Missouri Ruralist (16X) | 84.1 | 107.7 | 264.2 | 349.6 |
| Ohio Farmer (16X) | 103.1 | 108.9 | 312.6 | 336.8 |
| Pennsylvania Farmer (16X) | 72.1 | 68.1 | 236.8 | 235.9 |
| High Plains Journal: | | | | |
| Eastern Kansas (52X) | 438.9 | 467.8 | 910.5 | 979.7 |
| Colorado | 456.2 | 479.6 | 933.1 | 1,001.0 |
| Nebraska | 439.9 | 451.0 | 909.5 | 952.4 |
| Oklahoma-Texas | 456.0 | 463.9 | 931.4 | 969.3 |
| Western Kansas | 504.0 | 523.4 | 1,014.9 | 1,086.4 |
| Irrigation Age (10X) A. | 21.3 | 23.2 | 46.3 | 57.6 |
| Kentucky Farmer | 49.5 | 70.5 | 149.7 | 173.2 |
| Lancaster Farming (52X) | 1,724.1 | 1,644.9 | 3,653.7 | 3,520.8 |
| Midwest Unit: | | | | |
| The Farmer (24X) | — | — | — | — |
| Nebraska Farmer (23X) | 164.4 | 177.9 | 474.0 | 566.7 |
| Prairie Farmer (21X) A. | 140.1 | 163.3 | 411.6 | 506.0 |
| Indiana Edition (21X) | 140.2 | 162.4 | 405.6 | 486.1 |
| Wallace's Farmer (21X) A. | 109.4 | 137.0 | 337.0 | 460.9 |
| Wisconsin Agriculturist (21X) | 73.0 | 103.3 | 225.5 | 317.3 |
| Pecan South (6X) | 12.3 | 23.8 | 33.6 | 45.7 |
| Progressive Farmer A. | 155.1 | 150.3 | 352.7 | 408.1 |
| Publications: | | | | |
| Coastal Plains Farmer | 20.7 | 29.2 | 48.6 | 80.2 |
| Flue Cured Tobacco Farmer | 33.7 | 24.2 | 83.2 | 76.7 |
| Peanut Farmer (8X) | 51.4 | 42.5 | 92.8 | 87.8 |
| Successful Farming Now A. | 121.5 | 111.9 | 374.9 | 390.0 |
| Tennessee Farmer | 34.3 | 41.4 | 77.8 | 92.2 |
| Top Producer | 39.9 | 48.6 | 131.3 | 109.4 |

| | Pages | | | |
|---|---|---|---|---|
| | April-June 1987 | April-June 1986 | Jan.-June 1987 | Jan.-June 1986 |
| Western Unit Farm Magazines: | | | | |
| Colorado Rancher & Farmer (14X) | — | — | — | — |
| Western Farmer-Stockman Mags: | | | | |
| Ariz. Farmer-Stockman (12X) | 38.8 | 56.2 | 81.7 | 123.3 |
| Idaho Farmer-Stockman (20X) | 77.5 | 106.5 | 208.3 | 287.4 |
| Mont. Farmer-Stockman (20X) | 150.7 | 157.8 | 318.7 | 392.2 |
| Ore. Farmer-Stockman (20X) | 60.6 | 78.6 | 155.6 | 218.1 |
| Utah Farmer-Stockman (20X) | 55.3 | 66.6 | 142.1 | 166.6 |
| Wash. Farmer-Stockman (20X) | 73.3 | 90.1 | 173.7 | 237.1 |
| Total Group | 6,778.2 | 7,131.2 | 15,853.5 | 17,259.8 |
| % change | | -5.0% | | -8.1% |
| **— Poultry —** | | | | |
| Broiler Industry | 133.0 | 143.2 | 300.0 | 326.8 |
| Poultry Digest | 69.1 | 67.8 | 138.5 | 126.6 |
| Poultry Tribune | 67.2 | 58.0 | 116.4 | 115.5 |
| Poultry & Egg News | — | — | — | — |
| Poultry Times | — | — | — | — |
| Northeast/Midwest | — | — | — | — |
| Pacific Edition | — | — | — | — |
| Southeast Edition | — | — | — | — |
| Southwest Edition | — | — | — | — |
| Poultry & Egg Marketing | — | — | — | — |
| Total Group | 269.3 | 269.0 | 554.9 | 568.9 |
| % change | | + 0.1% | | -2.5% |

(X) Represents the number of times published each year; publications are monthly unless otherwise specified. A. Sectional linage included but prorated to circulation of regional editions.

All figures represented in this chart are supplied by the magazines. Advertising Age makes no attempt to verify them and, therefore, is not responsible for inconsistencies or errors.

# Workshop spells out 'how to' of print ads

New York—Discovering how to write effective, sales-producing copy and learning how to boost the communication power of print ads will be the focus of several sessions at the Advertising Age Creative Workshop, scheduled for Aug. 23 to 26 at the New York Hilton.

Priscilla Waring, VP, Gallup & Robinson, will present a comparison of high and low-performing ads in a wide range of product and service categories and will demonstrate which techniques work best in today's competitive environment.

In her session, entitled "In the Eye of the Beholder," Ms. Waring will concentrate on how to use high-impact visual and illustrative elements to capture readers' attention and deliver the company's message.

Another presentation, called "The A, B & C of Effective Print," will be given by Anthony Antin, former director of creative services for *Reader's Digest*.

Mr. Antin will examine the standards by which print advertising can be judged.

Steve Hayden, exec VP-senior creative director, BBDO Worldwide, will look at the changing role of print advertising in "Define Print and How to Do It."

Mr. Hayden will discuss ways in which an agency can improve its print capabilities and will demonstrate the rewards of successes and the cost for failures in print.

Another examination of the power of print will be given by a panel of executives from some of today's leading small-to-midsize agencies. John Connors Jr., president of Hill, Holliday, Connors, Cosmopulos, will moderate the panel. Panel members will be Thomas Monahan, president-creative director, Leonard Monahan Saabye; Andy Berlin, principal, Goodby, Berlin & Silverstein; and Lee Lynch, chairman, Carmichael-Lynch.

For more information, contact Advertising Age Education, 220 E. 42nd St., New York 10017; or call 1-800-233-3435. In New York state, call (212) 210-0296.#

# Connor backs video items

Wausau, Wis.—Connor Toy Corp. plans to spend $1 million on a merchandising effort for Videosmarts and ComputerSmarts during the summer and early fall.

Interactive video displays were placed in more than 2,000 retail outlets, said Jan Allan Nowak, Connor's VP-marketing communications.

He said 15 toy and retail chains will participate.

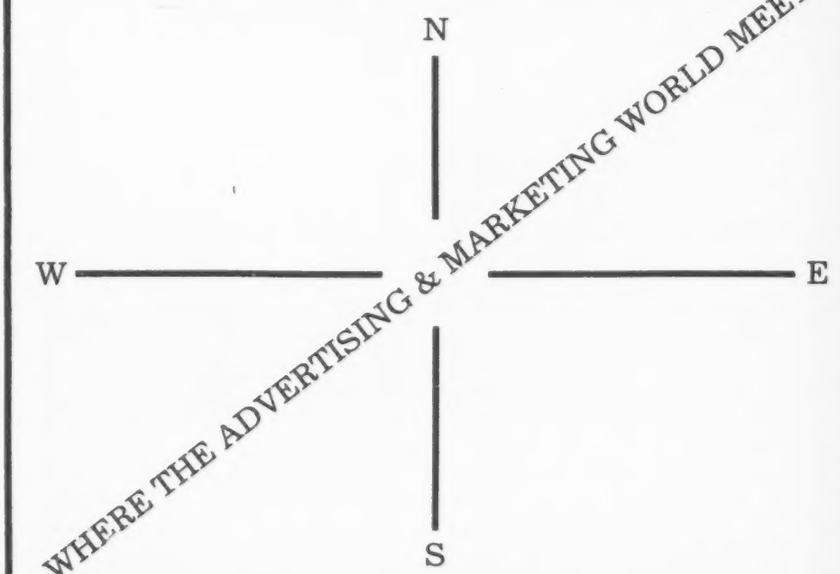
Each display will be equipped with a TV monitor, self-wind videocassette and a demonstration tape on Videosmarts, an electronic VCR-based learning system, and the more advanced ComputerSmarts.

Both products are attached to VCRs, but the latter also can be used as a portable computer for children ages 6 to 10.

ComputerSmarts will hit retail shelves in August.

Connor's other major line is Gymboree Corp., Burlingame, Calif., the internationally franchised exercise program for children (AA, July 6).#


THE ADVERTISING AGE CREATIVE WORKSHOP
August 23-26 at The New York Hilton




800 Participants · 43 Countries · 45 Speakers

Direct your inquires to:

1-800-233-3435 or 212-210-0296

# INTERNATIONAL AGENCY/CLIENT REPORT

## How to read the charts

ADVERTISING AGE asked the 28 agencies surveyed for this year's report to list accounts that were worth at least $3 million and that were served in at least three countries as of Dec. 31, 1986.

The charts are not a complete breakdown of every agency's offices and clients. Some countries were not included because of lack of space, and some accounts were not listed because information about them came in after deadline. Additional business is listed in the "Notes to Charts" that follow the agency summaries.#

## N W Ayer

| Clients: | Americas | | | | | | | | | | Europe | | | | | | | | | | | | | | | Asia,Pacific | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Argentina | Brazil | Canada | Chile | Mexico | Peru | Uruguay | | | Austria | Belgium | Denmark | France | Germany | Greece | Italy | Netherlands | Norway | Portugal | Spain | Sweden | Switzerland | Turkey | U.K. | | | Australia | Hong Kong | Japan | Korea* | Malaysia | New Zealand | Singapore | Thailand |
| Avon | • | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Bahamas | • | | | | | | | | | | | | | • | • | | • | | | | | | | | • | | | | | • | | | • | • |
| Bristol Myers | | | | | | | | | | | | | | | • | | | | | | | • | | | • | | | | | | | | | |
| Burger King | | | | | | | | | | | | | | | | | | | | | • | | | | | | | | • | | • | | | |
| Cariplo | • | | | | | | | | | | | • | | • | • | | | | | | | | | | • | | | | | | | | | |
| Copper Dev. Assn. | | | | | | | | | | | | | | • | • | | • | | | | | | | | • | | | | | | | | | |
| Deere & Co. | • | • | | | | | | • | | | • | • | | • | • | | • | | • | • | • | | | | | | | | | | | | | |
| Ecolab | | | • | • | | | | • | | | | • | | | | | • | | | | | | | | • | | | • | | | | | | |
| General Motors | • | | | | | | | | | | | • | | • | • | | | • | | | | | | | • | | | | • | | | | | |
| Gillette | • | | | | | | | | | | | | | • | | | | • | • | • | • | | • | | • | | | | | | | | | |
| Iberia | • | | | | | | • | | | | • | | | • | • | | | • | | | • | | | • | | | | | | • | | | | |
| McGregor Navire | | | | | | | | | | | • | | | • | | | • | | • | • | • | | | | | | | | | | | | | |
| Nordica | • | | | | | | | | | | • | | | • | • | | | • | | | | | | | • | | | | | • | | | | |
| Playmobil Toys | | | | | | | | | | | | • | | • | | | | • | | | | | | | | | | | | | | | | |
| Puma/All Weather Sports | | | | | | | | | | | | • | | • | | | | • | | | | | | | • | | | | | | | | | |
| Ricoh | | | | | | | | | | | • | • | | • | • | • | • | • | | • | • | | • | • | • | | | | | | | | | |
| Rothmans | | | | | | | | | | | | | | | | | | | | | | | | | • | | | • | | • | | | | |
| SE Banken | | | | | | | | | | | | | | • | | | | | | | | • | | | • | | | | | | | | | |
| ST DuPont | | | | | | | | | | | | | | | | | | | | | | | | | | | | | • | | • | | • | • |
| Tri Wall | | | | | | | | | | | | | | • | • | | | • | | | | | | | | | | | | | | | | |
| Unichema | | | | | | | | | | | | | | • | • | | | | | | | | | | • | | | | | | | | | |
| USTTA | • | | | • | | • | | | | | | | | • | • | | | • | | | | | | | • | | | | • | | • | | | |
| Vredestein Tires | | | | | | | | | | | | • | | • | • | | | • | | | | | | | • | | | | | | | | | |

*Non-equity affiliation. Source: N W Ayer

## N W Ayer

N W Ayer, New York, had non-U.S. gross income of $33.4 million in 1986, a 24.6% increase over 1985. Non-U.S. billings were up 31.4% to $229.3 million. Worldwide gross income reached $125.5 million, of which 26.6% came from international business. Worldwide billings totaled $901.3 million, with international contributing 25.4%.

Ayer owns majority or maximum-allowable stock in 12 agencies and has non-equity affiliations with 23 others.

In 1986, Ayer bought majority equity in the TAPSA agency, based in Madrid. Connaghan & May Ayer in Australia bought Baker Robson Marygold in Melbourne and merged the CMA and BRM agencies. The new agency is now known as Baker Robson Marygold Ayer.

Major international business won in 1986 included Avon Products, Continental Airlines, Burger King Corp. (Hong Kong, Spain); Renault (Italy); Henkel (France); Ford Motor Co., BMW (Malaysia); Samsonite Corp., S.T. Du Pont Co. (Hong Kong); General Motors Corp. (U.K.); Subaru, Courvoisier (Australia); Bacardi Imports, Franklin Mint (Spain); Gillette Co., Ricoh (pan-European).

The agency lost the Smirnoff account in France, Visa in Singapore and Clairol Appliances in the U.K.

Key international executives include: Louis Hagopian, chairman-ceo; Jerry Siano, vice-chairman and chairman, Ayer, New York; Tom Maxey, president-international; Ted Regan, exec VP-international creative director; Peter Elder, senior VP-managing director, Europe/Middle East; David Dodd, senior VP-managing director, Asia/Pacific/Latin America; and James Haag, senior VP-international business development.#

## Ted Bates Worldwide

| Clients: | Americas | | | | | | | | | | Europe | | | | | | | | | | | | | | | | | Asia,Pacific | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Argentina | Brazil | Canada | Chile | Colombia | Ecuador | Mexico | Peru | Venezuela | Austria | Belgium | Denmark | Finland | France | Germany | Greece | Italy | Netherlands | Norway | Spain | Sweden | Switzerland | Turkey | U.K. | South Africa | Middle East | Australia | Japan | Hong Kong | Korea* | New Zealand | Singapore | Taiwan | Thailand |
| Air New Zealand | | | | | | | | | | | | | | | | | | | | | | | | | | | | • | | • | | • | • | | |
| Avis | • | | | | | | | | | | | | | | | | | | | • | • | | | | | | | | | | | | | | |
| Bang & Olufsen | | | | | | | | | | | | | • | | | | | | | • | | • | | | | | | | | | | | | | |
| Benckiser | | | | | | | | | | | | • | • | | | • | • | • | • | | • | | | • | • | | | | | | | | | | |
| BMW | | | | | | | • | | | | | | | | | • | | | | | | | | | | | • | | | | | | | | |
| British Petroleum | | | | | | | | | | | | | | | | | • | | | • | | | | | | • | | | | | | | | | |
| Brio Scanditoy | | | | | | | | | | | | | | • | | | | | | • | | • | | | | | | | | | | | | | |
| BAT | | | | • | | | | | | | | • | | | | | • | | | | • | | | | • | | | • | | | | | | | |
| Caltex | • | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | • | | |
| Am. Cyanamid | | | • | | | • | | | | | | | | | | | | | | | • | | | | | • | | | | | | | | | • |
| De Beers | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | • | | | • | • | • |
| DHL | | | • | • | • | • | • | | • | • | • | • | • | • | • | • | • | • | • | • | • | • | • | | • | • | • | • | | • | • | • | • | • | |
| Diners Club | | | | | | | | | | | | | | | | • | • | | | | | | | | | | | | | | | • | | | |
| Electrolux | | | | | | | | | | | | • | | | | | | | | | | • | | | | | | | | | | | | | |
| Estee Lauder | • | | | | | | | | | | | • | | | • | | | | | | • | | | | | | | | • | • | | | | | |
| Hong Kong Bank | | | | | | | | | | | | | | | | | | | | | | | | | | | • | | | • | | | • | | |
| Honig | | | | | | | | | | | | | | • | | | | | • | | | | | | | | • | | | | | | | | |
| S.C. Johnson | | | | | | | | • | | | | | | | | | • | | | | | | | | | • | | | | | | | | | • |
| Lego | | | | | | | | | | | | | • | | | | | | | | • | | | | | | | | | | | | | | |

## Ted Bates Worldwide

Ted Bates Worldwide, New York, part of Saatchi & Saatchi's network, had non-U.S. gross income of $203.4 million in 1986, up almost 14% from 1985. Non-U.S. billings rose nearly 14% to almost $1.4 billion.

Worldwide gross income was $486 million in 1986, with international contributing 41.8% of that figure. World billings were $3.2 billion, with international also accounting for 41.8%.

Bates' network consists of 104 offices in 46 countries.

A breakdown of equity holdings and non-equity affiliations was not available at press time.

Business gained in 1986: German Tourist Organization, Pirolli, Fyn Tours (Denmark); Mars M&Ms, Balisto, Beecham, Williams shaving gel (France); Mars M&Ms, IDA Irish Development, Milupa (Germany); Effem Pet Foods, Fortress Ltd., Air New Zealand (Hong Kong); Guaber, Greenpeace (Italy); Mars, Balisto, Whitehall

(Continued on Page 52)

## Ted Bates Worldwide

| Clients: | Americas | | | | | | | | | | Europe | | | | | | | | | | | | | | | South Africa | Middle East | Asia,Pacific | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Argentina | Brazil | Canada | Chile | Colombia | Ecuador | Mexico | Peru | Venezuela | Austria | Belgium | Denmark | Finland | France | Germany | Greece | Italy | Netherlands | Norway | Spain | Sweden | Switzerland | Turkey | U.K. | | | Australia | Japan | Hong Kong | Korea* | New Zealand | Singapore | Taiwan | Thailand |
| Mars | ● | ● | ● | ● | | | | | | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Matchbox | | | | | | | | | | | ● | | | | ● | ● | | ● | | | ● | | ● | | ● | | | | | | | | | | |
| 3M | | | | | | | | | ● | | | | | | | | | | | | | | | | | ● | ● | | | | | | | | |
| Nicholas | | | | | | | | | | | | ● | | | ● | ● | | | ● | | ● | | ● | | | ● | ● | | | | | | | | |
| Nissan | | | | ● | ● | | | | | | | | | | | | | | | | | | | | | ● | | ● | | | | | | | |
| Olivetti | | | | | | | | | | | ● | ● | ● | | | ● | ● | | ● | ● | ● | ● | ● | | | | | | | | | | | | |
| Panasonic | ● | | | | | | | | | | | | ● | | | | | | | ● | | | | | | | | ● | | | | | | | |
| SAS | | | | | | | | | | | ● | | ● | | | | | | | ● | | ● | | | | | | | | | | | | | |
| Schering-Plough | | | | ● | | ● | | | | | ● | | | | | | | | ● | | | ● | | | | | | | | | ● | | | | |
| Seico | | | | | ● | | ● | | | | | | | | | | ● | ● | ● | | | | | | ● | ● | ● | ● | | | ● | | | | |
| Shell | | | | | | ● | | | | | | | | | | | | | | | | | ● | | | | | | | ● | | ● | | | |
| Shelleys Chem. | | | | | | | | | | | | | | | | | | | | | | | | | | | | ● | | ● | ● | | ● | | |
| Simmons | ● | | | ● | | | | ● | | ● | | | | | | | | | | | | | | | | | | ● | | | | | | | |
| Tambrands | | | | | | | | | | | | | | | | | | | | | | | | ● | | | | ● | | | | ● | ● | | ● |
| Thomas Cook | | | | | | | | | | | | | | | | | | | | | | | | | | ● | ● | | ● | ● | | | | | |
| Tuborg | | | | | | | | | | | | ● | ● | | | | | | | | ● | | | | | | | | | | | | | | |
| Union Carbide | | | | ● | | | | | | ● | | | | | | | ● | | | | | | | | | | | ● | | | ● | | ● | | ● |
| Warner Lambert | | | | ● | | | | ● | | ● | | ● | | ● | | | ● | | | | ● | ● | | | | ● | | | | | | ● | | ● | |
| Xerox | ● | | | | | | ● | | | | | | | | | | | | | | | | | | | ● | | | | | | | ● | | |

*Non-equity affiliation. Source: Ted Bates Worldwide

## BBDO Worldwide

| Clients: | Americas | | | | | | | | | | Europe | | | | | | | | | | | | | | | | | Africa | Middle East | Asia,Pacific | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Brazil | Canada | Chile | Peru | Colombia | Mexico | Puerto Rico | Guatemala | Venezuela | Austria | Belgium | Denmark | France | Germany | Italy | Netherlands | Finland | Norway | Spain | Sweden | Switzerland | U.K. | Greece | Portugal | | | Australia | Japan | Hong Kong | New Zealand | Singapore | Korea* | Taiwan | Indonesia |
| Alfred Dunhill | ● | | | | | | | | | | ● | | | | | | ● | | | | | | ● | | | | | | ● | ● | | | ● | ● | |
| Apple Computer | ● | | ● | ● | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | ● | | ● | | | ● | ● | ● | ● | ● | | ● | |
| Bayer | | | | | ● | ● | ● | | | ● | | | | | ● | | ● | | | | | | ● | ● | | | | | | | | | | | ● |
| Campbell Soup | ● | | | | | | | ● | | | | ● | | | | | | | | | | | | | | | | ● | | ● | ● | | | | |
| Chesebrough-Ponds | ● | | | | | | | | | | ● | | | | | | | | | | | | | | | | | | ● | | | | | | |
| Delta Airlines | ● | | ● | | | | | ● | | | | | | | ● | | | | | | | | ● | | | | | | ● | | | | | | |
| DuPont | ● | ● | | | | | | | | | | | | | | | | | | | | | ● | | | | | | | | | | | | |
| Frito Lay/PFI | ● | ● | | | | | ● | | ● | | | | | | | | | | | ● | ● | | | | | | | ● | | | | | ● | | |
| Gillette | ● | ● | | | | ● | ● | | | | | ● | ● | ● | ● | ● | ● | | | ● | ● | ● | ● | ● | | ● | ● | ● | | | | | | | ● |
| Hasbro | ● | | | | | | ● | ● | | | | | | | | ● | | | | | | | | | | | | | | | ● | | | | |
| Henkel | | | | | | | | | | | ● | ● | | ● | ● | ● | ● | | | ● | | | | | | | | | | | | | | | |
| Johnson & Johnson | | | | | | ● | | | | ● | | ● | | | | | ● | | | | | | | | | ● | | | | ● | | | | |
| KPI/Gulf | | | | | | | | | | | | ● | ● | | | ● | ● | | | | ● | | ● | | | | | | | | | | | | |
| Mexx | ● | | ● | | | | | | | | | ● | | ● | | | ● | | | | | ● | ● | ● | | | | | | | | | | | |
| Nestle | | | ● | | | | | | | | | ● | | ● | ● | | ● | | | ● | | ● | | | | | | | ● | | | | | | |
| Pepsico | ● | | | | ● | ● | | | ● | | | | | | ● | | ● | | | | | | ● | ● | | | | | ● | | | ● | | | |
| Philips | | | | | | | | | | | | ● | | | ● | | | | | | | ● | ● | ● | | | ● | ● | | | | ● | ● | | |
| Polaroid | ● | | ● | | | | | | | | | | | | | | | | | | | | | | | | | | ● | | | | | | |
| Rothmans | | | | | | | | | | | | | | | ● | | ● | | | | | | | | | | | | ● | ● | | | | | |
| S.C. Johnson | | | | | | | | | | | | | | | | | | | | ● | | | | ● | | ● | | | | | ● | ● | | | |
| Scott Paper | ● | | | | | | ● | ● | | | | ● | | ● | | | | | | | | | | | | | | | | | | | | | |
| Smithkline | ● | | ● | | | | | | | | | | | | ● | | | | | | ● | | ● | | | | | | | | | | | | |
| Ucar | | | | | | | | | | | ● | ● | | ● | ● | ● | | | | ● | | | | | | | | | | | | | | | |
| Unilever | ● | ● | ● | | | | | ● | | | | | | | | | ● | | | | | | | | ● | | | | | | | | | | |
| Visa | ● | | | ● | | ● | | | ● | | | | | | | | | | | | | | | | | | ● | | ● | | ● | ● | ● | | ● | |
| Vittel | ● | | | | | | | | | | | ● | | ● | | | | | | | | | | | ● | | | | | | | | | | |
| Worldwide Church of God | ● | | ● | | | | | | | | | | | | | | | | | | | | ● | ● | | | ● | | ● | ● | ● | ● | | | |
| Wrigley | ● | | ● | | | | | | | | | | | ● | ● | ● | | | ● | | | | ● | | | | | | | | | | | | |

*Non-equity affiliation. Source: BBDO Worldwide

## Bozell, Jacobs, Kenyon & Eckhardt

| Clients: | Americas | | | | | | | | | | Europe | | | | | | | | | | | | | | | Middle East | | Asia,Pacific | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Canada | Jamaica | Mexico | Puerto Rico | Trinidad | | | | | Belgium | France | Germany | Italy | Norway | Spain | Sweden | Switzerland | U.K. | | | | | | | | | Australia | Japan | Hong Kong | Sri Lanka | New Zealand | | | | |
| American Airlines | ● | | | ● | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Bulgari | ● | | | | | | | | | | | ● | | | | | | ● | | | | | | | | | | | | | | | | | | |
| Chrysler | ● | | | ● | ● | | | | | | | | ● | | | | | | | | | | | | | ● | | | | | | | | | | |
| Eastman Chemical | ● | ● | | | | | | | | | | ● | | | | ● | | | ● | | | | | | | | | | | | | | | | | |
| Holiday Inn | ● | | | | | | | | | | | ● | ● | ● | | ● | | | ● | | | | | | | | | | | | | | | | | |
| Merrill Lynch | ● | ● | | | ● | | | | | | | | ● | | | | | | ● | | | | | | | | | ● | ● | ● | | | | | | |
| Nestle | | | ● | | | ● | | | | | | | | | | | | | | | | | | | | | | | | | ● | | | | | |

(Continued from Page 50)

(the Netherlands); Budget and Avis automobile rentals, Bang & Olufsen (Norway); DHL, Robert Bosch (Portugal).

Accounts lost included Trykkeri (Denmark); Olivetti personal computer, Henninger Bier (Germany); Colgate-Palmolive dental cream (Hong Kong); Barbieri, Aperol (Italy); Gouda's Glorie, Haagtechno Panasonic (Netherlands).

Other lost accounts: Statoil, Philips (Norway); Shulton PineSol, Iqua Balance (Venezuela).

Top international executives include: Donald M. Zuckert, chairman-ceo-president, Ted Bates Worldwide; Lawrence Light, exec VP-president, international; and Bruce McLaren, exec VP-president-ceo, Europe.#

## BBDO Worldwide

BBDO Worldwide, New York, had non-U.S. gross income of $138.1 million in 1986, up 10% from 1985. Non-U.S. billings rose 13% over 1985 to $1.2 billion.

Worldwide gross income reached $445.1 million in 1986, with international making up 31% of the total. Worldwide billings were $3.3 billion, with international business accounting for 36.8% of that total.

The network has 85 agencies in 45 countries outside the U.S., and holds equity in 75. BBDO is part of the Omnicom group with DDB Needham.

In 1986, BBDO gained additional business from clients including Alberto-Culver Co., Apple Computer, Frito-Lay, Gillette Co., Pepsi-Cola Co., Polaroid Corp. and Visa International. The agency reported no foreign accounts lost.

Top international executives: Norm Campbell, chairman-ceo; Willi Schalk, president-ceo; Phil Dusenberry, vice chairman-chief creative officer; Tom Clark, vice chairman; Lew Pringle, chairman, BBDO, Europe; Eduardo Vargas, chairman, BBDO, Latin America; Geoff Wild, chairman, BBDO, Asia Pacific; Andrew Donchak, director-worldwide account services; and Shipley Munson, director-worldwide agency services.#

## Bozell, Jacobs, Kenyon & Eckhardt

Bozell, Jacobs, Kenyon & Eckhardt, New York, had non-U.S. gross income of $18.5 million in 1986, a 2% increase over the previous year.

Non-U.S. billings rose 4% to $125 million in 1986.

Worldwide gross income was $175.6 million in 1986, 10.5% of which was international business. Worldwide billings were $1.25 billion, with international accounting for a 10% share.

BJK&E has 51 overseas offices in 38 countries and owns majority or maximum-allowable stock in 20, minority interest in 10 and has non-equity affiliations with 21.

BJK&E's management is arranging a buyback of the agency from its owner, Lorimar Telepictures Corp.

New accounts added in 1986 included Gruppo Prime, Gruppo Editoriale Fabri, Toro Assicurazioni (Italy); Texas Instruments (France, Germany, Spain); Revlon, Merrill Lynch (Germany, Canada); and Spanish National Tourism (Germany). Accounts lost included Club Mediterranee (France, Italy) and Helena Rubinstein (Italy, Germany, Mexico).

Top international executives: Murray Smith, president, international; Peter Handley, senior VP-area director/Europe; Michael Anderson, senior VP-area director/Asia-Pacific; Shawki Safieddine, senior VP-area director/Middle East; Roy McKechnie, senior VP-area director/Latin America-Caribbean; Linda Falone, VP-international communications.#

## Bozell, Jacobs, Kenyon & Eckhardt

| Clients: | Americas: USA | Canada | Jamaica | Mexico | Puerto Rico | Trindad | Europe: Belgium | France | Germany | Italy | Norway | Spain | Sweden | Switzerland | U.K. | Middle East | Asia,Pacific: Australia | Japan | Hong Kong | Sri Lanka | New Zealand |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Revlon | • | • | | • | • | | | • | • | • | • | | • | | • | | • | • | • | | • |
| Texas Instruments | • | • | | | | | • | • | • | • | | • | | • | | | | | | | |

Source: Bozell, Jacobs, Kenyon & Eckhardt

## Leo Burnett Co.

| Clients: | Americas: USA | Canada | Argentina | Chile | Colombia | Guatemala | Mexico | Panama | Puerto Rico | Venezuela | Europe: Belgium | Denmark | France | Germany | Greece | Italy | Netherlands | Spain | Switzerland | Turkey | U.K. | Middle East: Egypt | Lebanon | Asia,Pacific: Australia | New Zealand | Hong Kong | Japan | Philippines | Singapore | Taiwan | Thailand |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bayer/Miles | | | • | | • | | • | | • | • | | | | • | | | | | | | | • | | | | | | | | | |
| Beatrice | • | • | | | | | | | | | | | | | | | | | | | | | | | | • | | | | | |
| Beecham | | | | | | | | • | | • | | | | | | | | | | | | | | | | • | | | | | |
| Cathay Pacific | | • | | | | | | | | | • | | • | • | | • | | | | | • | | | • | • | • | • | • | • | • | • |
| First Brands | • | | | | | | | | | | | | • | | | | | • | | | | • | | | | • | | • | • | | |
| Heinz/Star-Kist | • | • | | | | | | | | • | | | • | | | | | | | | | | | | | | • | | | | |
| Hewlett-Packard | • | | | | | | | | | | | | | | | | | | | | | | | • | • | • | | | • | • | |
| Kellogg | • | • | | | • | • | • | • | • | • | | • | • | • | | • | | • | | | • | | | • | | • | • | | | • | • |
| Kraft | • | • | | | | | | | | • | | | | • | | • | | • | | | • | | | • | • | | | | | | |
| Mars | • | | | | | | | • | • | | | | | | | | | | | | | | | | | | | | | | |
| McDonald's | • | | • | | | | | • | • | | | • | | | | | | | | | • | | | | | | | • | | | |
| Philip Morris | • | • | • | • | • | • | • | • | • | • | • | • | • | • | • | | • | • | • | • | • | • | • | • | | • | • | • | • | • | • |
| Pillsbury/Green Giant | • | • | | | | | | | • | | • | | • | | | | | • | | | • | | | | | | | | | | |
| Procter & Gamble | • | • | | • | • | • | • | • | • | • | • | • | • | • | • | • | • | • | • | | • | | | • | | • | • | • | • | • | |
| Pepsico | | • | • | • | | | • | • | | | | • | • | | | • | • | • | | | • | | | • | • | • | • | • | • | • | • |
| United Airlines | • | | | | | | • | | | | | | | | | | | | | | • | | | • | • | • | | • | • | • | • |
| Warner Lambert | | | | | • | | • | | | • | | | | | | | | | | | | • | | | | | | | | | • |

Source: Leo Burnett Co.

## DFS Dorland Worldwide

| Clients: | Americas: USA | Argentina* | Brazil* | Canada* | Chile* | Mexico* | Colombia* | Puerto Rico* | Venezuela* | Europe: Denmark* | Finland* | Italy | Netherlands | Norway* | Sweden | Switzerland* | U.K. | Asia,Pacific |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Caterpillar | | | | | | | | | | • | • | • | • | • | • | • | • | |
| CPC | • | • | | | | | | • | • | | | | | | | | | |
| Duracell | | • | | | • | | | | | | | • | | | | | • | |
| Fiskars | | | | | | | | | | | • | | | • | • | | | |
| Hewlett Packard | • | | • | | | | | | | | | • | | | | | | |
| London Rubber Co. | | | | | | | | | | | | • | • | | | | • | |
| Mexican Tourism | • | | | | | | | | | | | • | | | | | • | |
| Mouliner | | | | • | | • | | | • | | | | | | | | | |
| Pan Am | | | | | • | • | | | • | | • | | | | | | | |
| Pedro Domecq | | | | | | | • | | • | • | | | | | | | | |
| Sara Lee | • | | | | • | • | | • | | | | | | | | | | |
| Sheraton | | | | | | | | | | | | | | | • | | • | |
| Shulton/Am. Cyanamid | • | • | | | | | | | | | | | | | | | • | |
| Toyota | • | | | • | | | | | | | | | | | | | | |
| Wrangler | • | • | | | • | | • | | | | | | | | | | | |
| Yoplait/Sodima | | • | | | • | | • | | | | | | | | | | | |

*Non-equity affiliation. Source: DFS Dorland Worldwide.

## DMB&B

| Clients: | Americas: USA | Argentina | Canada | Mexico | Europe: Austria | Belgium | Denmark | Finland | France | Germany | Greece | Ireland | Italy | Netherlands | Norway | Spain | Sweden | Switzerland | U.K. | Asia,Pacific: Australia | Japan | Hong Kong | Indonesia | New Zealand | Singapore | Thailand |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Allied Lyons | | | | | | | • | | | | | | | • | | | | | • | | | | | | | |
| Am. Cyanamid | • | | | | | | | | | • | | | • | | | | | | | | | | | | | |
| Am. Home Products | • | | | • | | | | | • | | | | • | | | | | | • | | • | • | | | | |
| Anheuser-Busch | • | | • | | | | | | | | | | | | | | | | | | | • | | | | |
| BASF | | | | | • | | • | | | • | • | | | | | | | | | | | | | | | |
| Barclays Bank Int'l | • | | • | | | | • | | | • | • | | | | | | | | • | • | | • | | | | |
| Bayer A.G. | • | | • | | • | • | | | | • | | | • | • | | | | | • | | • | | • | • | | |
| Beatrice | | | • | • | | | | | | | | | | | | | | | | • | | | | | | | |
| Boots | | | | | | • | | | | | | | | | | • | | | • | | | | | • | | |
| Bongrain | | | | | | • | | | • | | | | • | | | | | | | | | | | | | |
| Bristol-Myers | • | | • | | | | | | | | | | | | | | | | | • | • | | | • | | |

### Leo Burnett Co.

Leo Burnett Co., Chicago, had non-U.S. gross income of $104.2 million in 1986, an increase of 15.7% from 1985. Non-U.S. billings rose nearly 17% to $700.2 million last year.

Gross income was $292.3 million in 1986, with more than 35% coming from international accounts.

Worldwide billings were $2 billion, with international representing 34% of the total.

Burnett's non-U.S. network consists of 45 offices in 34 countries. It owns majority or maximum-allowable stock in 42 agencies, minority in three and has a non-equity affiliation with five.

Major accounts gained by the agency in 1986 included PepsiCo (in 23 countries) and First Brands (France, Spain, Egypt, Hong Kong, Philippines, Singapore).

Accounts lost last year included Seven-Up Co. (in 23 countries) and Union Carbide Corp. (Canada, Colombia, Netherlands, Egypt, Hong Kong, Philippines).

Top international executives include: Henry Feeley, chairman-ceo, international; Michael Conrad, president-chief creative director; regional managing directors Albert Winninghoff (Europe/Middle East), Tony Houghton (Canada), Bruce Bullpitt (Australia/New Zealand), Kerry Rubie (Asia) and Sergio Suarez-Solis (Latin America).#

### DFS Dorland Worldwide

DFS Dorland Worldwide, New York, was formed in April 1986, when Dancer Fitzgerald Sample merged with Dorland Advertising, a U.K. subsidiary of Saatchi & Saatchi. The agency last month was merged by Saatchi with Saatchi & Saatchi Compton Worldwide.

The agency had non-U.S. gross income of $3.6 million in 1986, a 38.4% increase over comparable figures for 1985. Non-U.S. billings were $24.6 million, up 41.3% from 1985.

Worldwide gross income was $119.6 million, of which 3% was international. Worldwide billings were $926 million, with international business accounting for 2.7% of the total.

The network has 28 agencies with 41 offices in 26 countries. DFS Dorland owns majority or maximum-allowable stock in six agencies, a minority interest in three and has non-equity affiliations with 19.

Major international accounts won in 1986 included Pan American World Airways (Chile, Mexico, Venezuela, U.K.) and Wrangler-V.F. Corp. (Argentina, Chile, Colombia). Accounts lost last year included Distillers (France, Spain, U.K.), Fax beer (Denmark, Germany, Italy, Sweden) and Wendy's International (Canada, Australia, Japan).

Top international executives: Stuart Upson, chairman; William Vickery, director-international; Robert Eagan, senior VP-management supervisor; Michael Bungey, director-Europe.#

### DMB&B

D'Arcy Masius Benton & Bowles, New York, had non-U.S. gross income of $144.4 million in 1986, an 8.1% increase from 1985. Non-U.S. billings rose 6.9% to $959.1 million.

Worldwide gross income reached $336.3 million last year, and international business contributed about 43% of the total.

World billings were up 1.3% to close to $2.3 billion, with 42% coming from international.

As of first quarter 1987, foreign agencies included 51 offices in 28 countries, with a majority interest in 49 and minority in two.

DMB&B has a non-equity affiliation with 14 other foreign agencies. In 1986 it still was experiencing shakeout of accounts as a result of the merger of D'Arcy MacManus Masius and Benton

*(Continued on Page 55)*

## DMB&B

| Clients: | Americas: USA | Argentina | Canada | Mexico | Europe: Austria | Belgium | Denmark | Finland | France | Germany | Greece | Ireland | Italy | Netherlands | Norway | Spain | Sweden | Switzerland | U.K. | Asia,Pacific: Australia | Japan | Hong Kong | Indonesia | New Zealand | Singapore | Thailand |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Ciba-Geigy | ● | | | | | | | ● | | ● | | | | | | | | | | | | ● | | | | |
| Citicorp | | ● | | | | | | | | | | | ● | | | | | | ● | | | | | | | |
| Combe | ● | | | | | | | ● | | | | | ● | | | | | | | | | | | | | |
| Coopers & Lybrand | ● | | | | | | | | | | | | | ● | | | | | | | | | | ● | | |
| Digital Equipment | | | | | ● | | | ● | ● | ● | | | ● | ● | ● | ● | | | ● | | | | | | | |
| Dow Chemical | ● | | ● | | | | | | | | | | | | | ● | | | ● | | ● | ● | | | | |
| Fiat | | | | | | ● | ● | | | ● | | | ● | | | ● | ● | ● | | | | | | | | |
| FTD/Interflors | ● | | ● | | | | ● | | | ● | | | | | ● | | | | ● | ● | ● | | | | | |
| General Foods | ● | | | | | | | | | | | | ● | | | ● | | | ● | | | | | | | |
| General Motors | ● | | | ● | | | | | | | | | | | | | | | ● | ● | | | | | | |
| Glaxo | | | | | | | | | | | | | | | | | | | ● | | ● | ● | | | | |
| Guinness/Distillers | | | | ● | | ● | | | | | | | | ● | | | | ● | ● | ● | | | | | | |
| Heinz | ● | | ● | | | | | | ● | | | | | | | | | | | | | | | | | |
| Hoechst | | | | | | | | | | ● | | | ● | | | ● | | | ● | | ● | | | | | |
| Hoffman La Roche | ● | | | | | | | | | ● | | | ● | | | | | | ● | | ● | ● | | | | ● |
| Hoover | | | | | | ● | | ● | ● | | | | ● | | | | | ● | ● | | | | | | | |
| Imperial Chemical | ● | | | | | | | | | ● | | | | | | ● | | | | ● | ● | | | | | |
| S.C. Johnson | ● | | | | | | | | | | | | ● | | | | | | ● | | | | | | | ● |
| Kimberly-Clark | | | | | | | ● | | | | | | | | | | ● | ● | ● | | | | | | | |
| Lego | | | | | | | | | | ● | | | | ● | | | | | | | | | | | | |
| Lotus | | | | | | | | | ● | ● | | | ● | ● | | | | | ● | | | | | | | |
| Mars | ● | | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | ● | ● | ● | | | | | |
| E. Merck | | | | | | | | | | ● | | | ● | | | ● | | | ● | | | | | | | |
| Mobil | | | | | | ● | | | | | | | | | | | | | | ● | | | | ● | | |
| NCR | ● | | | | | | | | ● | | | | | | | | | | | | | | | | | |
| Nobel Industries | | | | | ● | ● | ● | ● | ● | ● | | | ● | ● | ● | ● | ● | ● | | | | | | | | |
| Pernod | ● | | ● | | | ● | ● | | ● | ● | | | | ● | | | | ● | ● | ● | ● | ● | | | | |
| Pfizer | ● | | | | | | | | | ● | | | | | | | | | ● | | ● | | | | | |
| Procter & Gamble | ● | | ● | ● | | ● | | | ● | ● | | | | ● | ● | ● | ● | | ● | | ● | | | | | |
| Rhone-Poulenc | | ● | | | | | | | | ● | | | | | | ● | | | ● | | | | | | | |
| Richardson-Vicks | ● | | | ● | | | | | | | | | ● | ● | | ● | | | ● | ● | | | | ● | ● | ● |
| Ricoh | | | | | | | | | ● | | | | | | | | ● | ● | | | | | | | | |
| Royal Canadian Mint | | | ● | | | ● | | | | | | | | | | | | | | ● | ● | | | | ● | |
| G.D. Searle | | | | ● | | | | | | ● | | | | | | ● | | | | | ● | | | | | |
| Schering-Plough | ● | | ● | | | | | | | ● | | | ● | | | | | | ● | | | ● | | | ● | |

Source: DMB&B

## DDB Needham Worldwide

| Clients: | Americas: USA | Canada | Mexico | Europe: Austria | Belgium | France | Germany | Italy | Netherlands | Portugal | Spain | Sweden | Switzerland | U.K. | Middle East* | Asia,Pacific: Australia | Japan | Hong Kong | Malaysia | New Zealand | Singapore | Taiwan | Thailand |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| American Airlines | | | | | | ● | ● | | | | | | ● | ● | | | ● | | | | | | |
| Audi | ● | ● | | | ● | ● | | ● | | ● | ● | | | | | | | | | | ● | | |
| BAT | | | | | | | ● | | | | ● | | | | | | | | ● | | | | |
| Benckiser | | | | | | ● | ● | | | | ● | | | | | | | | | | | | |
| Blendax | | | | ● | ● | | ● | | ● | | | | | | | | | | | | | | |
| Boots | | | | | | | | | ● | | | | | ● | | ● | | ● | ● | | ● | ● | ● |
| Bristol-Myers | ● | | | | | | | ● | | | ● | | ● | ● | | | ● | | | | | ● | |
| Chanel | ● | ● | | | | | | | | | ● | | | | | ● | ● | | | | | | |
| China Airlines | ● | | | | | | | | ● | | | | | | | | ● | ● | | | ● | | |
| Colombia Coffee Growers | ● | ● | | | | | | | | | ● | | | | | | | | | | | | |
| Delsey Luggage | | | | | ● | ● | ● | ● | ● | | | | ● | ● | | | | | | | | | |
| Harlequin | | ● | | | | | | | | | ● | | | | | | ● | | | | | | |
| Hasbro | ● | | | | ● | ● | | | | | ● | | | ● | | | | | | | | | |
| Heinz | ● | | | | | | | | | | | | | | | ● | ● | | | | | | |
| IBM | | | | | | | | | | | ● | | | | ● | ● | ● | | | | | | |
| S.C. Johnson | | | | | ● | ● | | | ● | ● | ● | | | ● | | ● | ● | ● | | | | | |
| Knorr | | | | | | | | | ● | ● | ● | | ● | | | | | | | | | | |
| McDonald's | ● | | | | | | ● | | | | ● | | ● | | | ● | | ● | | ● | ● | ● | ● |
| Memorex | ● | ● | | | | | ● | | | | | | | ● | | | | | | | | | |
| Michelin | ● | ● | | | | | | | | | | | | | | ● | | | | | | | |
| Mitsubishi | ● | | | | | | | | | | | | | | | ● | ● | ● | | | | | ● |
| Mobil | ● | | ● | | | | | | | | | | | | | | | ● | | | | | |
| NEC | ● | | | | | | | | | | | | | ● | | ● | | | | | | | |
| Porsche | | ● | | | ● | | | | ● | | | | | | | | | | | | | | |
| Quaker | | ● | | | ● | ● | | | | | | | | | | | | | | | | | |
| Reckitt & Colman | | | | | | ● | | | | | ● | | | ● | | | | | | | | | |
| Sara Lee | | | | | | | | | | | | | | | | ● | | ● | | | ● | | |
| Seagram | ● | | | | ● | ● | ● | | ● | ● | | | ● | ● | | | ● | | | ● | | | |

& Bowles in 1985. More than 100 foreign accounts were added in 1986 while about 70 were lost.

The agency's top international executives include: John S. Bowen, chairman-ceo; George J. Simko, president-diversified communications; Peter T.W. Redsell, president-international; Craig D. Brown, exec VP-chief financial officer; Bernard Kanner, exec VP-international.#

## DDB Needham Worldwide

DDB Needham Worldwide had non-U.S. gross income of $125 million in 1986, and non-U.S. billings of $830.9 million. Worldwide gross income was $375 million in 1986, of which 33% came from international business.

Worldwide billings reached nearly $2.6 billion, and international accounts made up 32% of that total.

The agency operates in 40 cities in 22 countries. It owns a majority or maximum-allowable interest in 63 agencies and minority in 29. It has a non-equity affiliation with one.

Omnicom Group's DDB Needham Worldwide was created with the merger of Doyle Dane Bernbach and Needham Harper Worldwide, both New York. The merger was completed in November 1986 and resulted in major changes in the operation's domestic and international businesses. Overall, the new agency increased its international accounts in 1986; gains included Mobil Oil, S.C. Johnson Co., Toys "R" Us and Xerox in Hong Kong.

Top international executives: Keith Reinhard, chairman-ceo; John Bernbach, president-chief operating officer; John Bradstock, president-international division; and Barbara Wolfson, VP-international service group.#

## DYR Worldwide

DYR Worldwide, New York, a 50-50 joint venture between Dentsu, Tokyo and Young & Rubicam, New York (the world's largest and second-largest ad agencies, respectively), had non-U.S. gross income of $31.2 million in 1986, up 50.7% over 1985. Non-U.S. billings were $215.9 million, up 50.5% over the previous year.

Worldwide gross income was $50.7 million, with international business representing 61.5%. Worldwide billings were $347.1 million, 62.2% of which were from outside the U.S.

The network has offices in seven countries outside Japan and the U.S.

In 1986, Canon USA threatened to move its $60 million 35mm camera account from DYR because Y&R had gained rival Eastman Kodak Co.'s 35mm account. Although both Dentsu and Y&R contend DYR is an independent network, Y&R sold its shares in DYR's $95 million New York office to Dentsu-owned DCA, which now handles Canon. Also last year, DYR opened an office in China. Accounts gained include Holiday Inn in China and Unisys (Sperry/Burroughs) in China, Hong Kong and Japan.

Top international executives: Minoro Kamata, chairman (Tokyo); Tim Pollak, president-ceo (New York); Sinzo Uneno, exec VP-area director, Southeast Asia/Australia; Peggy Healy, senior VP-business affairs manager.

## Eurocom Group

Eurocom Group, Paris, had total, non-French gross income of $41.4 million in 1986, down 13% from 1985.

Worldwide gross income was $216.4 million, 19% of which was outside France.

In 1985, worldwide gross income was $129.1 million, 37% of which was outside France.

Eurocom's foreign shops include 15 in nine countries in the HCM network. Eurocom has a 51% interest in HCM, with Young & Rubicam holding the

*(Continued on Page 56)*

## DDB Needham Worldwide

| Clients: | Americas: USA | Canada | Mexico | Europe: Austria | Belgium | France | Germany | Italy | Netherlands | Portugal | Spain | Sweden | Switzerland | U.K. | Middle East* | Asia,Pacific: Australia | Japan | Hong Kong | Malaysia | New Zealand | Singapore | Taiwan | Thailand |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Spanish Tourist Off. | | | | • | | • | | | | | • | | • | | | | | | | | | | |
| Thai Airways | | | | | | | | | | | | • | | • | | • | • | | | | | | |
| Volkswagen | • | • | • | | • | • | • | • | • | • | • | | | • | | | | • | | | • | | |
| Wrigley | • | | | | | | | | | | | | | • | | • | | | | • | | | |

*Non-equity affiliation. Source: DDB Needham Worldwide

## DYR Worldwide

| Clients: | Americas: USA | Europe: Germany | Asia,Pacific: Hong Kong | Japan | Malaysia | Singapore | Thailand |
|---|---|---|---|---|---|---|---|
| Adidas | | | • | | • | • | |
| Colgate-Palmolive | | | • | • | • | | • |
| Hong Kong Tourism | • | | • | • | • | • | • |

Source: Advertising Age

## Eurocom Group

| Clients: | Americas: USA | Brazil | Canada | Europe: Austria | Belgium | Denmark | Finland | France | Germany | Italy | Netherlands | Norway | Portugal | Spain | Sweden | Switzerland | U.K. | Africa | Middle East | Asia,Pacific: Australia | Hong Kong | Japan |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| BNP | | | | | | | | • | | | | | | • | | | | | | | | |
| Biotherm | • | | • | • | • | • | • | • | • | • | • | • | • | • | • | • | • | • | • | | • | • |
| Freetime | | | | | | | | • | | | • | | | | | | | | | | | |
| Hollywood Chewing-Gum | | | | | • | | | • | | • | | | • | • | | • | | | • | | | |
| Lee Cooper | | | | | • | | | • | • | • | | | | | | • | • | | | | | |
| Lesieur | | • | | | | | | | | | | | | | • | | | | | • | | |
| L'Oreal | • | | | • | • | • | | • | • | • | • | | • | • | | • | • | | • | | | |
| Renault Trucks | | | | • | • | | | • | • | • | • | | • | • | | | • | | • | | | |
| Ricils Cemey | | | | | • | | | • | | • | | | • | | | | | | | | | |
| Strafor | | | | | • | | | • | • | • | | | | • | | • | • | | | | | |
| Vanderbilt | • | | | | • | | | • | | • | • | | | | | | | | • | | | |

Source: Eurocom

## Foote, Cone & Belding

| Clients: | Americas: USA | Canada | Brazil | Colombia | Costa Rica | Dominican Rep. | Ecuador | Mexico | Puerto Rico | Venezuela | Europe: Austria | Belgium | Denmark | France | Germany | Greece | Italy | Netherlands | Norway | Portugal | Spain | Sweden | Turkey | U.K. | U.A.E. | South Africa | Asia,Pacific: Australia | Hong Kong | Japan | Malaysia | New Zealand | Philippines | Singapore | Thailand |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Airbus Industrie | | | | | | | | • | | | | | | | | | • | | | | | | | • | | | | | | | | | | |
| Beiersdorf | | | | • | • | | | | | | | | | • | • | | | • | | • | • | | | | | | | | | | | | | |
| Bermuda Tourism | • | • | | | | | | | | | | | | | | | | | | | | | | • | | | | | | | | | | |
| British Caledonian | | | | | | | | | | | | • | | | • | | • | • | | | • | | | • | • | | | | • | • | | | | |
| Cadbury-Schweppes | • | | | | | | | | • | | • | | • | • | • | | | | • | • | • | | | • | | • | | | | | | | | |
| California Raisin | • | • | | | | | | | | | | • | | | • | | | | • | | | • | | • | | | | | | | | | | |
| Ciba-Geigy | • | | | | | | | | | | | | | | | | • | | | | | | | | | | | | | | | • | | |
| Citicorp | • | | | | | | • | | | | | | | | | | | • | | • | | | | • | | • | | | | | | | | |
| Clorox | • | | | | | | | | • | | | | | | | | | | | | | | • | | | | | | | | | | | |
| Colgate-Palmolive | • | • | • | • | • | • | • | • | • | • | | | • | • | • | • | • | | • | • | • | • | • | • | • | • | • | • | | • | • | • | • | • |
| Data General | • | • | | | | | | • | | • | • | • | • | • | • | | • | • | | | • | • | | • | | | • | • | • | | • | | | |
| Gillette | | | | | | | • | • | | | | • | • | • | • | | • | | | | • | | | • | | • | | | | | | | | |
| Grand Metropolitan | • | • | | | | | | | • | • | | | | | | | | | | | | | | • | | • | | | | | | | | |
| Hiram Walker | | | • | | | | | | | • | | • | | • | • | | • | • | | • | • | | | • | | • | • | | | | | | | • |
| Kimberly Clark | • | • | • | | • | | | | | • | | • | | • | | | | • | | | | | | | | | | | | | | | | |
| Kiwi Brands | • | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Kraft | • | | | | | | | | | | | | | | | | • | | | | | | | • | | | | | | | | • | | |
| Mazda | • | • | | | | | | | • | | | • | | | | | | • | | | | | | | | | | | | | | | | |
| National Westminster Bank | | | | | | | | | | | | | | | | | | • | | | • | | | | | | | | | | | | | |
| Nestle | • | | | | | | | • | | • | | | | • | | • | | | | • | | | | • | | | | | • | | | | | |
| Newsweek | • | | | | | | | | | | | | | | | | | | | | | | | • | | • | | | | | | | | |
| Pepsico | • | • | | | | | | • | • | | | | | | • | | | | | | | | | • | | | | | | | | | | |
| RJR/Nabisco | • | | | | • | | | | • | | | | | | | | | | | | | | | • | • | | | | • | | | | | |
| Royal Bank of Canada | • | • | • | | | | | | | • | | | | | | | | | | | | | | • | | | | | | | | • | | |
| S.C. Johnson | • | • | | | • | | | | | | | • | • | • | | | • | | • | • | • | • | | | | | | | | | | | | |
| Schering-Plough | | | • | • | | | • | | | | | | • | | • | | | | | | | | | • | | | | | | | | | | |
| Shulton | | | | | | | | | | | | | | | | | • | | | | • | | | • | | • | | | | | | • | | |
| Sunkist Growers | • | • | | | | | | | | | | • | | | | | | | | | | | | | | | | | | | | | | |

*(Continued from Page 55)*

remaining 49%.

Through its Univas partnership, Eurocom holds equity in agencies in five countries and has partnerships in eight countries. With Belier, Eurocom has a 20% equity in CDP International in four countries. Havas, which owns 45% of Eurocom, is being privatized, though the government will maintain a "golden share" that will prevent hostile takeovers.

Top international executives: Bernard Brochand, president, and Claude Douce, VP.#

## Foote, Cone & Belding

Foote, Cone & Belding Communications, Chicago, had non-U.S. gross income of $80.6 million in 1986, up 14.4% from 1985. Non-U.S. billings also rose 14.4%, topping the $537 million mark in 1986.

Worldwide gross income was $323 million in 1986, with international making up 25% of the total. Worldwide billings reached $2.2 billion, and there, too, international business held a 25% share. In 1985, FCB's non-U.S. gross income equalled 24.8% share of total.

FCB owns a majority or maximum-allowable interest in 46 agencies, has a minority interest in 17 and has non-equity affiliation with seven agencies outside the U.S. In 1986, FCB completed the integration of the NCK Organization. The agency closed offices in Berlin, Rome and Singapore because of insufficient volume and added offices in Thailand, Malaysia and Turkey. FCB merged with three foreign agencies in Mexico, Venezuela and Australia, and in Canada bought an agency and a public relations company.

FCB picked up 28 new accounts in 11 countries in 1986. Accounts lost included Pelforth (France); ICI Dulux (Germany); Renault (Italy); Kraft Inc., Gordon's gin, ICI Dulux (U.K.); Kraft and Kentucky Colonel (Canada).

Top international executives: Norman W. Brown, chairman-ceo; Abbott C. Jones, president-chief operating officer; Stanley Katz, vice chairman; W.R. Wirth Jr., exec VP-corporate resources; Craig R. Wiggins, president-ceo, FCB/Continental Europe; Len Sugarman, vice chairman-creative officer, FCB/London; Antonio Beja, chairman, FCB/Latin America-Pacific-Africa, and chairman, international committee of the board; Jose M. Cubas, president, FCB/Latin America; and Kevin Dutton, chairman, FCB/Australia-New Zealand.#

## GGK

GGK, an agency group headquartered in Basel, Switzerland, had non-U.S. income of $40.3 million in 1986, 81.7% of total gross income of $49.3 million. The network consists of 16 agencies in 10 countries.

Major international accounts won in 1986 include Beiersdorf (Brazil, Netherlands, Spain). The agency lost the United Technologies account, which it had represented in the U.S., France, Germany and the U.K.

Top international executives: Peter Erzberger, director-international executive board, and Karl Gerstner, president.#

## Grey Advertising

Grey Advertising, New York, had non-U.S. gross income of $105.5 million in 1986, a jump of 38.6% from the previous year. Non-U.S. billings rose at the same rate to $703.7 million.

Worldwide gross income was $309.1 million, of which 34.1% was international business.

Worldwide billings were just more than $2 billion, showing a 21% increase; international accounted for about 34% of the total.

The network consists of 66 agencies in 30 countries.

Grey gained Mars business in Aus-

## *Foote, Cone & Belding*

| Clients: | Americas | | | | | | | | | | | Europe | | | | | | | | | | | | | | | | | | | | Asia,Pacific | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Canada | Brazil | Colombia | Costa Rica | Dominican Rep. | Ecuador | Mexico | Puerto Rico | Venezuela | | Austria | Belgium | Denmark | France | Germany | Greece | Italy | Netherlands | Norway | Portugal | Spain | Sweden | Turkey | U.K. | | U.A.E. | South Africa | | Australia | Hong Kong | Japan | Malaysia | New Zealand | Philippines | Singapore | Thailand | |
| Wrigley | | | | | | | | | | | | | | | | | ● | | | ● | | | ● | | | | | | | | | | | | | | | | |
| Zenith | ● | ● | | | | | | | | | | | | | ● | | | | | | | | | | | | | | | | | | | | | | | | |

Source: Foote, Cone & Belding

## *GGK*

| Clients: | Americas | | | | | | | | | | | Europe | | | | | | | | | | | | | | | | | | | | Asia,Pacific | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Brazil | | | | | | | | | | Austria | France | Germany | Italy | Netherlands | Spain | Switzerland | U.K. | | | | | | | | | | | | | | | | | | | | | |
| Austrian Tourist Board | | | | | | | | | | | | | ● | | ● | | ● | ● | | | | | | | | | | | | | | | | | | | | | |
| Beiersdorf | | ● | | | | | | | | | | | | | | ● | ● | | | | | | | | | | | | | | | | | | | | | | |
| Henkel | | | | | | | | | | | | | ● | ● | ● | ● | ● | | | | | | | | | | | | | | | | | | | | | | |
| IBM | | | | | | | | | | | | ● | ● | ● | ● | ● | | ● | ● | | | | | | | | | | | | | | | | | | | | | |
| IWC | | | | | | | | | | | | ● | ● | ● | | ● | ● | ● | | | | | | | | | | | | | | | | | | | | | | |
| Jaegermeister | | | | | | | | | | | | ● | | ● | ● | | ● | ● | | | | | | | | | | | | | | | | | | | | | | |
| Lois Jeans | ● | | | | | | | | | | | | | ● | | | | | ● | | | | | | | | | | | | | | | | | | | | | |
| Porsche Design | | | | | | | | | | | | ● | ● | | ● | | | ● | | | | | | | | | | | | | | | | | | | | | | |
| Swissair | | ● | | | | | | | | | | ● | | ● | ● | ● | ● | ● | ● | | | | | | | | | | | | | | | | | | | | | |

Source: GGK

## *Grey Advertising*

| Clients: | Americas | | | | | | | | | | | Europe | | | | | | | | | | | | | | | | | | | | South Africa | | Asia,Pacific | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Argentina | Canada | Chile | Peru | Uruguay | Venezuela | Mexico | | | | Austria | Belgium | Denmark | France | Germany | Italy | Netherlands | Norway | Spain | Sweden | Switzerland | U.K. | | | | | | | | | | | | | | | | | | |
| Avis | | | ● | | | | | | | | | | | ● | | | | | | | ● | | | | | | | | | | | | | | | | | | | |
| BankAmerica | ● | | | ● | | ● | ● | ● | | | | ● | | ● | ● | ● | ● | | | ● | ● | ● | ● | | | | | | | | | | | | | | | | |
| BAT | | | | | | | | | | | | | | | ● | ● | ● | | | ● | | | ● | | | | | | | | | | | | | | | | | |
| Bayer | | | ● | | | | | | | | | ● | ● | | | ● | | ● | ● | ● | | | ● | | | | | | | | | | | | | | | | |
| Beecham | ● | | ● | ● | | | ● | ● | | | | | ● | ● | ● | ● | | | ● | ● | ● | ● | ● | | | | | | | | | | | | | | | | |
| Block Drug Co. | ● | | ● | | | | | ● | | | | ● | ● | ● | ● | ● | ● | ● | | ● | ● | | ● | | | | | | | | | | | | | | | | |
| Boehringer Ingelheim | ● | | ● | | | | ● | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Bristol Myers | ● | | | | | | | | | | | | | | | ● | | | | | | | | | | | | | | | | | | | | | | | |
| BSN | | | | | | | | | | | | ● | ● | | ● | | | | | | | | | | | | | | | | | | | | | | | | |
| Canon | ● | | ● | | | | | | | | | | | | ● | | | | ● | | | | ● | | | | | | | | | | | | | | | | |
| Carter Wallace | | | | | | | | ● | | | | | ● | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Clairol | ● | | | | | | | | | | | ● | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Dunkin' Donuts | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Electrolux | ● | | | | | | | | | | | | | ● | | | | | | | ● | | | | | | | | | | | | | | | | | |
| General Foods | ● | | ● | ● | ● | | | | | | | | | | ● | | | | | | | | ● | | | | | | | | | | | | | | | | |
| Henkel | | | | | | | | | | | | ● | | | | ● | | | | | | | ● | | | | | | | | | | | | | | | | |
| Hertz | | | | | | | | | | | | ● | | | | ● | | | | | | | ● | | | | | | | | | | | | | | | | |
| InterContinental Hotels | | | | | | | | | | | | | | ● | | ● | ● | | | | | | ● | | | | | | | | | | | | | | | | |
| Johnson & Johnson | ● | | | | | ● | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Kenner Parker | ● | | | | | | | | | | | | | ● | | ● | ● | ● | ● | | | | ● | | | | | | | | | | | | | | | | |
| Le Clip | | | | | | | | | | | | | | | | ● | ● | | | | ● | | ● | | | | | | | | | | | | | | | | |
| Mars | | | | | | | | | | | | ● | | | | ● | ● | | | | | | ● | | | | | | | | | | | | | | | | |
| Melitta | | | | | | | | | | | | ● | ● | ● | ● | ● | | ● | | | ● | ● | ● | | | | | | | | | | | | | | | | |
| Mitsubishi | ● | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Nike | | | | | | | | | | | | ● | | | | ● | ● | | | | ● | | ● | | | | | | | | | | | | | | | | |
| Northwest Orient Airlines | | | | | | | | | | | | | | ● | | ● | | ● | ● | | ● | | ● | | | | | | | | | | | | | | | | |
| Pioneer | | | | | | | | | | | | ● | | ● | | ● | ● | | ● | ● | | ● | ● | | | | | | | | | | | | | | | | |
| Playtex | ● | | ● | ● | | | | ● | | | | | ● | | ● | ● | ● | | | ● | | ● | ● | | | | | | | | | | | | | | | | |
| Procter & Gamble | ● | | ● | ● | ● | | ● | ● | | | | ● | ● | ● | ● | ● | ● | | | ● | ● | ● | ● | | | | | | | | | | | | | | | | |
| Remington | ● | | ● | | | | | | | | | | | | | ● | | | | | | ● | ● | | | | | | | | | | | | | | | | |
| Rothmans | | | | | | | | | | | | | | | | | | | | | | | ● | | | | | | | | | | | | | | | | |
| Saudia Airlines | | | | | | | | | | | | | | | | | | ● | | | | | ● | | | | | | | | | | | | | | | | |
| Seagrams | | | ● | ● | | | | | | | | | | | | | ● | | | | | | | | | | | | | | | | | | | | | | |
| Shell | | ● | | | | | | | | | | | | ● | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3M | ● | | | | | | | | | | | | | | ● | ● | ● | | | ● | | | ● | | | | | | | | | | | | | | | | |
| Timex | ● | | ● | | | | | | | | | | | | | | | | ● | | | | ● | | | | | | | | | | | | | | | | |
| U.S. Mint | ● | | | | | | | | | | | ● | | | | ● | | ● | | | ● | | ● | | | | | | | | | | | | | | | | |
| Uniroyal Goodrich | | ● | ● | | | | | | | | | | | | ● | | ● | | | | ● | | ● | | | | | | | | | | | | | | | | |
| Warner Bros. | ● | | ● | | | | | | | | | | | | | ● | ● | | | | ● | | ● | | | | | | | | | | | | | | | | |
| Werner & Mertz | | | | | | | | | | | | | | ● | | ● | ● | | ● | | | | ● | | | | | | | | | | | | | | | | |
| Wrigley | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Source: Grey Advertising

tria and France; Nike business in Belgium, France and the U.K.; Hertz in Germany, South Africa and the U.K.

Grey also gained the U.S. Mint account in Germany, Hong Kong and Japan.

Accounts lost included Martini & Rossi in Argentina, Citroen in Belgium and Northwest Orient Airlines in Belgium and Taiwan.

Top international executives: Edward Meyer, chairman-president; Norman Vale, managing director-international; and area directors O. John Shannon, Europe; Frank Clarke, Americas; and Bruce McDonald, Pacific.#

## Hakuhodo

Hakuhodo, Tokyo, had gross income in 1986 of $309.6 million on billings of $2.27 billion. The agency declined to reveal the percentage of income and billings derived from outside Japan.

In 1985, Hakuhodo had non-Japanese gross income of $6.6 million—3.3% of its total.

It has majority or maximum-allowable interest in six agencies outside Japan and has non-equity relationships with seven other agencies.

Major international accounts added in 1986 are Kirin beer in Hong Kong and Toyota in London. It lost the TDK account, which it served in Japan, Australia and Germany.

Top international executives: Michitaka Kondo, chairman-ceo; Ritsuo Isobe, president; and Tadakatsu Ishikawa, executive manager-corporate public relations.#

## HCM

HCM, New York, a joint venture between Paris-based Eurocom (51%) and New York-based Young & Rubicam (49%), had non-U.S. gross income of $81.8 million in 1986, a 15.2% gain over the previous year. Non-U.S. billings rose to $545.4 million, also a 15.2% increase.

Worldwide gross income was $106 million, of which 79% was generated outside the U.S. Worldwide billings hit $723 million, and international business accounted for a 77.6% share of that business. HCM operates 31 offices in 10 countries, including the U.S., with a regional network of 12 shops in France. It owns a majority interest in all its agencies.

Accounts gained in 1986 included Bisquit cognac (France, Germany); Berlitz School, National Lottery, Larousse, Paribas Bank, Hewlett-Packard Co., KIS, CGE, Champion (France); Materne (Belgium); Deinhard, Sonnen & Basserman, Swiss Credit Bank, (Switzerland); Bongrain (Germany); Sony, Reckitt & Colman, Sunbeam (Switzerland); Hanorah, Essilor, Lovable, Pan American World Airways (Italy); Henkel, BDF, Nivea, CPC, Tempo, MIA, (Spain); Prince cigarettes (Netherlands); and Orangina, Pommery champagne (pan-European).

Accounts lost included SNCF-national railroad (France); Spies, Hecker & Co. (Germany); Allied Bakeries, Software Publishing (U.K.); and Lotto (Netherlands).

Top international executives: Robert Schmetterer, ceo-worldwide; Alain de Pouzilhac, ceo-Europe; Annie Prost, senior VP-director international accounts; and Alain Rousset, senior VP-chief financial officer.#

## Lowe International

Lowe International, London, is a division of Lowe Howard-Spink & Bell, which had worldwide gross income of $111.3 million in 1986, of which $91.3 million, or 82%, was outside the U.K.

Lowe International consists of 16 offices in 10 countries.

In 1986, Lowe gained Parker Pen business in the U.S. and France. It lost the Rothmans account in the U.K. but still has it in Australia and Bel-

*(Continued on Page 58)*

## Hakuhodo Inc.

| Clients: | Americas: USA* | Argentina | Brazil | Canada | Chile | Peru | Uruguay | Europe: Austria | Belgium | Denmark | France | Germany | Italy | Netherlands | Norway | Spain | Sweden | Switzerland | U.K.* | Asia,Pacific: Australia* | China | Hong Kong* | Japan | Malaysia | New Zealand | Singapore | Thailand |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Ajinomoto | | | • | | | | | | | | | | | | | | | | • | | | | • | • | | | • |
| Bridgestone | | | | | | | | | | | | | | | | | | | | | | | • | | | • | |
| Canon | • | | | | | | | | | | | • | | • | | | | | | | • | • | • | • | | • | |
| Citizen | • | | • | | | | | | | | | • | | | | | | | • | | • | • | • | • | | • | |
| Japan Air Lines | | | | | | | | | | | | | | | | | | | • | | | | • | • | | | |
| Jusco | | | | | | | | | | | | | | | | | | | | | | • | • | • | | | • |
| KAO | | | | | | | | | | | | | | | | | | | | | | | • | • | | • | • |
| Kirin | | | | | | | | | | | | | | | | | | | | | | • | • | | | • | |
| Konishiroku | • | | | | | | | | | | | | | | | | | | | | | • | • | | | | |
| Matsushita | | | | | | | | | | | | | | | | | | | | | | | • | | | • | • |
| NEC | • | | | | | | | | | | • | • | | | | | | | • | • | | • | • | | | • | |
| Nissin | | | • | | | | | | | | | | | | | | | | | | | | • | • | | • | |
| Toshiba | • | | | | | | | | | | | • | | | | | | | | • | | | • | • | | | |
| Toyota | | | • | | | | | | | | | | | | | | | | • | | | | • | | | | |

*Non-equity affiliation. Source: Hakuhodo Inc.

## HCM

| Clients: | Americas: USA | Europe: Austria | Belgium | Denmark | France | Germany | Italy | Netherlands | Norway | Spain | Sweden | Switzerland | U.K. | Asia,Pacific |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| BSN | • | | • | | • | • | • | | | • | | | • | |
| Chanel | | | | | | | | | | | | | | |
| Credit Suisse | • | • | • | • | | • | • | • | • | • | • | • | • | |
| Damart | | | | | • | | • | • | | • | | | | |
| Dow Chemical | • | • | • | • | • | • | • | • | • | • | • | • | • | |
| Du Pont | | | | | • | | | | | | | | • | |
| Henkel | | | | | • | | • | | | • | | | | |
| L'Oreal | | | • | | • | | • | • | | | | | | |
| 3M | | | • | | • | | | | | • | | | | |
| Pernod Ricard | • | | • | | • | • | • | | | • | • | | • | |
| Peugeot | • | | • | | • | • | • | • | | • | • | • | • | |
| Suchard | | | | | • | | | | | • | | | • | |
| Tourisme Israel | | | | | • | • | • | • | | • | | • | | |
| Woolmark | | • | | | | • | | | | | | • | | |

Source: HCM

## Lowe International

| Clients: | Americas: USA | Canada | Europe: Austria | Belgium | France | Germany | Italy | Netherlands | U.K. | Asia,Pacific: Australia |
|---|---|---|---|---|---|---|---|---|---|---|
| Coca-Cola | • | | | • | | • | | • | | |
| Electrolux/Zanussi | | • | | | • | | • | | | |
| General Motors | • | • | • | • | • | • | • | | • | |
| Henkel | | • | • | • | • | • | | • | | |
| IDV/Heublein | • | • | | | | | • | • | | • |
| Parker Pens | • | | | • | • | • | | • | • | |
| Unilever | • | | | • | | | | | • | |

Source: Lowe International

## Mojo MDA

| Clients: | Americas: USA | Asia,Pacific: Australia | New Zealand | Singapore |
|---|---|---|---|---|
| Australian Tourist Commission | • | • | • | • |
| Qantas | • | • | • | • |

Source: Mojo MDA

## McCann-Erickson

| Clients: | Americas: USA | Canada | Argentina | Brazil | Colombia | Ecuador | Mexico | Peru | Uruguay | Venezuela | Europe: Austria | Belgium | Denmark | Finland | France | Germany | Greece | Italy | Netherlands | Norway | Portugal | Spain | Sweden | Switzerland | U.K. | Kenya | South Africa | Asia,Pacific: Australia | China | Hong Kong | Japan | Malaysia | Philippines | Singapore | Thailand |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| American Express | • | • | | | • | • | | | | | | • | | | • | | | • | | | | | | • | • | | | | | | • | | | | |

(Continued from Page 57)

gium.

The agency's top international executives include: Frank Lowe, chairman; Les Delano, vice chairman, New York; and Keith Jacobs, international vice chairman.#

## McCann-Erickson

McCann-Erickson Worldwide, New York, had total gross income outside the U.S. amounting to $280.9 million in 1986, a gain of 14.8% over the company's non-U.S. gross income in 1985. The agency's total billings outside the U.S. in 1986 exceeded $1.87 billion, a 14.8% increase over 1985.

Worldwide gross income hit $428 million in 1986, with international making up 65.6% of the total. Worldwide billings registered $2.85 billion, with international also accounting for 65.6%.

McCann owns majority or maximum-allowable stock in 119 foreign shops and has non-equity affiliations with 22.

The company's international client list changed substantially in 1986, but overall results made for a solid net gain in non-U.S. business.

Gains included American Express Gold Card (Austria, Denmark, France, Italy) and Bayer Aspirin (Austria, Germany, Italy, Netherlands, Spain, Brazil).

Top international executives: Bob James, chairman-ceo; Jerry McNamara, president-ceo; Barry Day, vice chairman; Gianni Cottardo and Jerry Shively, exec VPs-Europe; Michael Ferrier, exec VP-Europe/Africa; Jens Olesen, exec VP-Latin America; and Max Cusnir, exec VP-Asia/Pacific.#

## Mojo MDA Group

Mojo MDA Group, Paddington, New South Wales, Australia, was formed in July 1986 with the merger of Mojo Australia and Monahan Dayman Adams.

In December, the group made its first move into the U.S. with the purchase of San Francisco-based Allen & Dorward.

The group had non-Australian gross income of $21.4 million in 1986, just more than half of its worldwide gross income of $42.4 million. It had non-Australian billings of $86.9 million in 1986, 31% of its worldwide billings of $282.8 million.

Mojo MDA's international network consists of 19 offices in four countries. The group also has non-equity affiliations with four agencies. The group is scheduled to open offices in the U.K. and New Zealand by Aug. 1.

A major account won since the merger is Swan Breweries in the U.S., which the agency already served in Australia.

Principal international executives include Brian Monahan, chairman; Malcolm Spry, group managing director; Don Morris, managing director; and Wayne Kingston, head of the London office.#

## Ogilvy & Mather

Ogilvy & Mather Worldwide, part of the Ogilvy Group, New York, had non-U.S. gross income of $209.9 million in 1986, up about 32% from 1985. Non-U.S. billings were $1.49 billion, an increase of 31%.

Worldwide gross income was $459.6 million, of which 46% was international. Worldwide billings were $3.15 million, with international making up slightly more than 47% of that total.

The agency has 249 offices in 47 countries, including the U.S. It owns majority or maximum-allowable stock in 190 offices, a minority stake in 47 agencies and has non-equity affiliations with 12 agencies. In 1986, O&M Worldwide purchased Promotional Campaigns, a British sales-promotion company. The agency also purchased a minority interest in Reklam Moran, a Turkish ad agency, and entered into a non-equity association with Mahir, the major advertising agency in Hungary.

Key accounts gained in 1986 in-

## McCann-Erickson

| Clients: | Americas | | | | | | | | | | Europe | | | | | | | | | | | | | | | Africa | | Asia,Pacific | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Canada | Argentina | Brazil | Colombia | Ecuador | Mexico | Peru | Uruguay | Venezuela | Austria | Belgium | Denmark | Finland | France | Germany | Greece | Italy | Netherlands | Norway | Portugal | Spain | Sweden | Switzerland | U.K. | Kenya | South Africa | Australia | China | Hong Kong | Japan | Malaysia | Philippines | Singapore | Thailand |
| AHP | ● | | | ● | ● | ● | ● | ● | | | | | | | | ● | | | | | | | | | | | ● | | | | | | ● | | ● |
| Bayer/Miles | ● | | ● | ● | ● | ● | ● | | | ● | ● | ● | | | ● | ● | | ● | ● | | ● | ● | | | ● | ● | | | | | ● | ● | ● | ● |
| Beatrice/Hunt Wesson | | ● | | ● | ● | | ● | ● | | ● | | | | | | | | | | | | | | | | | | | | ● | | | | |
| Black & Decker | ● | | ● | ● | | | ● | | | ● | ● | ● | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | | | ● | | | ● | | ● | |
| Carnation | | | | | | | ● | | | ● | ● | | | | | | ● | ● | | | | | | | | | | | | | ● | ● | ● | ● | ● |
| Casio | | | | ● | ● | ● | | ● | ● | ● | | | | | | | | ● | | | | | | | | | | | | ● | ● | | ● | | |
| Chesebrough-Ponds | ● | ● | ● | | ● | | ● | ● | | ● | | | | | ● | ● | | ● | | | | ● | | | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● |
| Coca-Cola | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| CPC | | | | | | | | | | | | ● | | | | | | ● | ● | | | | | | | | | | | | | | | | |
| Del Monte | ● | ● | | | | | ● | | | ● | ● | ● | ● | ● | ● | | | ● | ● | ● | | ● | ● | | ● | ● | | | | ● | ● | ● | | ● | |
| Dow Chemical | | | ● | | | ● | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Exxon/Esso | ● | | ● | | ● | ● | | | ● | | ● | ● | ● | ● | ● | ● | | ● | ● | ● | ● | ● | | ● | ● | ● | | | | ● | ● | ● | ● | | |
| General Motors | ● | | ● | ● | | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | | ● | | ● | | | | ● | ● | ● | |
| Gillette | ● | | | ● | ● | ● | ● | ● | ● | ● | | | ● | | ● | ● | | ● | | | | ● | | ● | ● | | | | ● | ● | ● | ● | ● | ● | ● |
| Goodyear | | | ● | ● | ● | | ● | ● | | ● | ● | ● | ● | | ● | ● | ● | ● | | | ● | ● | ● | ● | ● | | ● | ● | | ● | ● | ● | ● | ● | ● |
| Henkel | ● | | | ● | | | ● | | | | ● | ● | | | ● | ● | ● | ● | ● | | | ● | | | ● | | | | | | | | | | |
| Heublein | ● | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | ● | | | | |
| Intergold | ● | | | ● | | | | | | | | | | | | ● | ● | ● | | | ● | ● | | | ● | | | | | ● | ● | | | | |
| Johnson & Johnson | ● | ● | ● | | | ● | ● | ● | | ● | | | | | ● | | | ● | | ● | ● | | | | | ● | ● | ● | ● | | ● | | ● | ● | |
| Levi Strauss | | | | | | | | | | | | ● | | | ● | ● | | ● | ● | | | ● | | ● | | | | ● | ● | ● | ● | ● | ● | ● | ● |
| L'Oreal | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | | ● | ● |
| Lockheed | ● | | | ● | | | ● | | | | | | | | | | | | | | ● | | | | ● | | | | ● | | ● | | | | |
| Lufthansa | ● | ● | ● | ● | ● | ● | ● | ● | | ● | | | | | | ● | | | | | | | | | | ● | | | | | ● | | | | |
| Martini & Rossi | ● | ● | ● | ● | ● | | | | ● | | ● | ● | ● | | ● | ● | | ● | ● | | ● | ● | | ● | ● | | | ● | | | | ● | | | ● |
| RJR Nabisco | ● | ● | | | | ● | | | | | | | ● | | | ● | | ● | | | ● | ● | ● | | ● | | | ● | ● | ● | ● | | ● | ● | |
| Nestle | ● | ● | | ● | | ● | ● | ● | ● | ● | ● | ● | | | | ● | ● | ● | | | ● | ● | | ● | ● | ● | | ● | | ● | ● | | ● | ● | ● |
| Quaker | | | | ● | ● | | | | | | | | | | | | | | | | | | | | | | | ● | | | | ● | | | |
| Reckitt & Colman | | | | | | | | | | | | | | | | | | ● | | | | | | | | | ● | ● | | | ● | | | | |
| R.J. Reynolds | ● | | ● | ● | | ● | ● | | ● | | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | ● | ● | ● | | ● | |
| Richardson-Vicks | | | | ● | | | | | | ● | | | | | | | | | | | | | | | | ● | | | | | ● | | ● | | |
| Texas Instruments | ● | ● | ● | ● | | | ● | | | ● | | ● | ● | ● | ● | ● | | ● | ● | ● | ● | | | ● | | | | | | ● | ● | | ● | | |
| Unilever | ● | ● | | ● | ● | | ● | | | | ● | ● | ● | ● | | ● | | ● | | | ● | ● | | ● | ● | ● | | | | | ● | ● | ● | | |
| Union Carbide | | | | ● | | | | | | | | ● | | | | | | | | | | | | | | ● | | | | | | | ● | | |

Source: McCann-Erickson

## Ogilvy & Mather

| Clients: | Americas | | | | | | | | | | Europe | | | | | | | | | | | | | | | | Africa | | Asia,Pacific | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Argentina | Brazil | Canada | Chile | Venezuela | Uruguay* | Ecuador* | Mexico | Paraguay* | Austria | Belgium | Denmark | France | Germany | Italy | Netherlands | Norway | Spain | Sweden | Switzerland | U.K. | Finland | Greece | Ireland | Kenya | South Africa | Australia | Japan | Hong Kong | Singapore | Thailand | China | Philippines | India |
| AGA | ● | | | | | | | | | | ● | | | | ● | | | ● | | ● | ● | ● | ● | | | | | | | | | | | | |
| Alfred Benzon | | | | | | | | | | | | ● | ● | | | | ● | ● | | ● | | | ● | ● | | | | | | | | | | | |
| American Express | ● | ● | ● | ● | ● | ● | | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | ● | ● | | ● | ● | ● | ● | ● | ● |
| BAT Industries | ● | ● | | | ● | ● | | | | ● | | ● | | | ● | | ● | ● | | | ● | | | | ● | ● | ● | | | ● | ● | | ● | | |
| Bayer | | | | | | | | | | | | | | | | ● | | | | | | | | | ● | | | | | | | | ● | | |
| Beecham | ● | | ● | ● | | ● | | ● | ● | | | | | ● | ● | | | | ● | | ● | ● | | | ● | | ● | ● | | ● | | | ● | ● |
| BMW | | | | | | | | | | | | | | | | | | | | | | | | | | | | ● | | ● | ● | | | | |
| Boeing | | | | | | | | | ● | | | | ● | | ● | | ● | | | | | ● | | | | | ● | ● | ● | ● | | | ● | ● | ● |
| British Tourist Authority | ● | ● | | ● | | | | | | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | ● | ● | | | | ● | ● | | ● | ● | | | | |
| California Prune Board | | | | | | | | | | | | | | | ● | ● | | ● | ● | ● | | ● | ● | | | | | | | | | | | | |
| Chesebrough-Ponds | ● | ● | | ● | | ● | | ● | ● | | | | | | ● | | | ● | | | | | | | ● | | | ● | | ● | ● | ● | | ● | ● |
| Compaq | ● | | | | | | | | | | | | | ● | ● | ● | ● | | | | | ● | | | | | | ● | | | | | | | | |
| Duracell | ● | | ● | ● | | | | | | | ● | | | | ● | | | | | | | | | | | | | | | ● | ● | | | | |
| General Foods | ● | ● | ● | ● | | ● | | | | ● | ● | | ● | ● | ● | ● | | | | ● | | | | | ● | | | | | ● | | ● | ● | | ● |
| Guinness | ● | | | | | | | | | | | ● | | ● | ● | | | | | | | ● | | | ● | ● | | ● | ● | ● | ● | ● | | | |
| Johnson & Johnson | | | | ● | | | | ● | | | | | | | | | | | | | | | | | | | | ● | | | | ● | | | ● |
| Kimberly-Clark | ● | | | ● | | | | | ● | | | ● | | ● | | ● | ● | | ● | | | ● | | | | | | | | ● | ● | ● | | ● | |
| Korean Air Lines | ● | | | | | | | | | | ● | | | ● | | | | | | | ● | | | | | | | ● | | ● | ● | ● | | ● | |
| Mattel | ● | | | ● | | ● | | ● | ● | | ● | ● | | ● | ● | ● | | ● | | | | ● | | ● | | | ● | ● | | ● | ● | ● | | | ● |
| Mercedes-Benz | | ● | ● | | | | ● | | | | ● | | | ● | ● | | | | | | | | | | | ● | | | | | | | ● | | ● |
| Nestle | | | | | ● | | | | | | | | | | | | | | | | ● | | | | ● | | ● | ● | | | ● | | | | |
| Northern Feather | | | | | | | | | | | | | | ● | ● | ● | | | ● | | ● | | ● | | | | | ● | | | | | | | |
| Nutrasweet | ● | | | ● | | ● | | | ● | | | | | ● | ● | ● | | | ● | | ● | ● | ● | ● | ● | | | ● | | | | | | | |
| Parker Pen | | | ● | | | | ● | | | | | | | | | ● | | | | | | | | | ● | | ● | | ● | ● | ● | ● | ● | ● | |
| Pepsico | | | | | | | | | | | | | | | | | | | | | ● | | | | | ● | | | | | ● | ● | | ● | |
| Philips | | ● | ● | | | | ● | ● | ● | ● | | ● | ● | | ● | ● | ● | ● | ● | ● | | ● | ● | | | | | ● | | ● | ● | ● | | | ● |
| Polaroid | | ● | ● | | ● | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | | ● | | ● | ● | ● | ● | ● | |
| Rank Xerox | | | | | | | | ● | | | | | ● | | ● | ● | ● | ● | | | | ● | ● | | | ● | | ● | | | | | | | |
| Seagram | ● | ● | ● | ● | | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | | | ● | | ● | ● | | | ● | | ● | ● | | ● | | | ● | | |
| Shell | ● | ● | ● | ● | ● | ● | | | ● | | ● | ● | | | ● | | ● | ● | ● | ● | ● | ● | ● | ● | | ● | ● | ● | | | ● | ● | | ● | |

cluded American Express Co. (Germany, Philippines); BAT Industries (Switzerland); Beecham, Dow Chemical Co. (Ecuador); Boeing (Australia, China, Germany, Philippines); California Prune Board (Finland, Germany, Italy, Norway, Spain, Sweden, U.K.).

Foreign accounts lost included BAT Industries (Brazil); Boeing (Sweden); Parker Pen (17 countries); and PepsiCo (Norway, Sweden).

The list Ogilvy and Mathers top international executives includes: Bill Phillips, chairman-ceo, Ogilvy Group; Ken Roman, chairman, O&M Worldwide; Alex Brody, president-international; Norman Berry, chairman-ceo, O&M, New York, and creative head, O&M Worldwide; Chuck Walsh, chief financial officer, O&M Worldwide.#

## Publicis International

Publicis International, Paris, had non-French gross income in 1986 of $47.5 million, 65.3% of total gross income of $72.7 million. Non-French billings were $324 million, 68.6% of the total of $472.3 million.

Publicis owns majority or maximum-allowable stock in 21 shops and has non-equity affiliations with 15.

In 1986, the agency gained the international account of Woolmark (Belgium, Netherlands) and lost the international accounts of Europcar and Waterman pens and most of Henkel, except in Austria.

The list of Publicis' key international officers includes: Marcel Bleustein-Blanchet, chairman, Publicis Group; Claude Marcus, chairman, Publicis International; and Marcel Levy, chairman, Publicis Conseil.#

## Roux, Seguela, Cayzac & Goudard

Roux, Seguela, Cayzac & Goudard, Paris, had non-French gross income of $27.6 million in 1986, 47.6% over its 1985 total. Non-French billings were $183.7 million, up 37.3% from the previous year. The agency's total worldwide gross income was $80.3 million last year on billings of $552.2 million. RSC&G owns majority stock in 18 agencies.

International accounts gained in the last year include Pernod-Ricard (France, Italy, U.K.) and Tempo Sanys (Germany). Accounts lost: Marlboro Leisurewear and Sheraton Hotels.

The list of key international executives includes: Bernard Roux, president; Jacques Seguela, VP; Alain Cayzac, president RSC&G-Paris; Jean-Michel Goudard, president, RSC&G International.#

## Saatchi & Saatchi Compton Worldwide

Saatchi & Saatchi Compton Worldwide, London, had non-U.S. gross income of $295.9 million in 1986, a 9.1% increase over 1985. Non-U.S. billings rose 7.8% to $1.94 billion in 1986. Worldwide gross income was $490.5 million, with non-U.S. gross income making up 60.3% of the total. Worldwide billings grew to $4.43 billion in 1986, with non-U.S. billings 43.8%.

The network includes 60 agencies, in which Saatchi holds equity in 32 and no equity in 28.

Last month, Saatchi & Saatchi PLC merged Saatchi & Saatchi Compton Worldwide and DFS Dorland Worldwide into Saatchi & Saatchi DFS Compton.

Accounts gained on an international basis in '86 include American Brands, Beecham Group, Bongrain Gerard, Commonwealth of Puerto Rico, Racal, Sterling and Tonka Corp. The agency

*(Continued on Page 60)*

## Ogilvy & Mather

| Clients: | Americas: USA | Argentina | Brazil | Canada | Chile | Venezuela | Uruguay* | Ecuador* | Mexico | Paraguay* | Europe: Austria | Belgium | Denmark | France | Germany | Italy | Netherlands | Norway | Spain | Sweden | Switzerland | U.K. | Finland | Greece | Ireland | Africa: Kenya | South Africa | Asia,Pacific: Australia | Japan | Hong Kong | Singapore | Thailand | China | Philippines | India |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| TWA | | | | | | | | | | | | • | | • | • | • | | | • | | • | | | • | | | | | | • | | | | | |
| Unilever | • | • | • | • | • | | | • | • | | • | • | • | • | • | • | • | • | • | • | • | • | • | | • | • | • | • | • | • | • | • | • | • | • |
| Warner Lambert | | | | | | | • | | | | | | | | | | | | | | | | | | | | | | | | • | • | | | |
| Westpac | | | | | | | | | | | | | | | | | | | | | | | | | | | | • | • | • | • | | • | | |
| ZF Corp. | • | | | | | | | | | | | | | • | • | • | | • | • | • | • | | | | | | | | | • | | | • | | |

*Non-equity affiliation. Source: Ogilvy & Mather

## Publicis International

| Clients: | Americas: USA | Europe: Austria | Belgium | France | Germany | Italy | Netherlands | Portugal | Spain | Sweden | Switzerland | U.K. | Asia,Pacific |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Air France | | | | • | • | | | | | • | | | |
| Boursin | | | • | • | • | | • | | | | • | • | |
| Dim | • | | • | • | • | • | • | • | • | • | • | • | |
| Europ Assistance | | | • | • | | | | | • | | | | |
| French Gov't Tourism | • | | | • | • | | | | | | | | |
| L'Oreal | • | • | • | • | • | • | • | • | • | • | • | • | |
| Nestle | | • | • | • | • | | • | | | | • | • | |
| Philips | | | | • | | | • | • | | • | • | • | |
| Renault | | • | • | • | • | | • | • | | | • | • | |
| Woolmark | | | • | • | | | • | • | | | | | |

Source: Publicis International

## Roux Seguela Cayzac & Goudard

| Clients: | Americas: French Caribbean | Europe: Austria | Belgium | France | Germany | Italy | Netherlands | Spain | Sweden | Switzerland | U.K. | Africa | Middle East | Asia,Pacific |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Citroen | • | • | • | • | • | • | • | • | • | • | • | | • | |
| Club Mediterranee | | • | • | • | • | • | | | | • | • | | | |
| Jacobs Suchard | | | | • | • | | | | | • | | | | |
| La Redoute | • | | | • | | | | | | | | • | | |
| Pernod Ricard | | | | • | | • | | | | | • | | | |
| Tempo Sanys | • | | | • | • | | | | | | | • | | |

Source: Roux, Seguela, Cayzac & Goudard

## Saatchi & Saatchi Compton Worldwide

| Clients: | Americas: USA | Brazil* | Canada | Chile* | Peru* | Puerto Rico | Venezuela* | Caribbean | Mexico* | Europe: Austria | Belgium* | Denmark* | Finland* | France | Germany | Greece | Italy | Netherlands | Norway | Spain | Sweden* | Switzerland | U.K. | Africa | Middle East | Asia,Pacific: Australia | Japan | Hong Kong | Korea* | New Zealand | Philippines | Singapore | Thailand* |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Allied Lyons | • | • | | | | • | | • | | • | | | | • | • | • | | • | | | | | • | • | | | | | | | | | | |
| American Brands | | | | | | | | | | | • | | | | • | • | | | | • | | | • | | | • | | | | • | | | | |
| American Home Products | • | | | | | | | • | | | • | | | • | | | | | | | | | • | | | | | | | | | | | |
| Avis | | • | | | | | | | | | | | | • | | | • | | | | | • | | | | | | | | | | • | | |
| Beecham | | • | | | | | | • | | | | | | • | | • | • | | | | | | | | • | • | | • | • | | | | | |
| Bongrain Gerard | | | | | | | | | | | | | | • | • | | | | | • | | • | | | | | | | | | | | | |
| British Airways | • | • | • | • | • | • | | • | • | • | • | • | • | • | • | • | • | • | | • | • | • | • | • | • | • | | • | | • | • | • | • | • |
| British Petroleum | • | | | | | | | | | | | | | | | | | | | | | | • | | | • | • | | • | | | | | |
| BSA Gervais-Danone | | | | | | | | | | • | • | | | • | • | | • | | | • | | | • | | | | | | | | | | | |
| Cadbury-Schweppes | | | | | | | • | • | | | | | | | | • | | • | | | | | • | • | | | | | | | | | | |
| Citicorp | | | | | | | | | | | • | | | | | | • | | | | | | • | | | | | | | | | • | | |
| Comm. of Puerto Rico | • | | • | | | • | | | • | | | | | | • | | | | | • | | | | | | | | | | | | | | |
| Du Pont | • | | | | | | | | | | | | | | • | | | | | | | • | • | | | | | | | • | | | | |
| Fuji | | • | | | | | | • | | | | | | | | | | | | | | | | | | • | • | | • | • | | | | |
| Gillette | | | | | | | | | | | | | | • | | | • | | | | | • | • | | • | | | | | | | | | |
| IT&T | • | | | | | • | | | | | | | | | | | | | | | | | • | | • | | | | | | | | | |
| Johnson & Johnson | • | | • | | | • | | | • | | | | | • | • | • | | | | • | | | | | • | | • | | | | • | | | |
| Le Sieur | | | | | | | | | | | | | | • | • | | | | | • | | | | | • | | | | | | | | | |
| Malaysian Tourist Bd. | • | | | | | | | | | | | | | | • | | | | | | | | • | | | | • | | • | | | | • | • |
| Mitsubishi | | | | | | • | | | | | | | | | | | • | | | | | | • | | | | | | | | • | • | | |
| Pepsico | | | | | • | • | • | • | | | | | | | | | | | | • | • | | | • | • | | | • | | • | | | | |
| Pfizer | | | | • | | | | | | | | | | | | | | | | | | | | | | | | | • | | • | • | | |
| Philips | | | | | | | | | | • | | | | | • | | • | • | | | • | • | | | | | | | | | | | | |
| Portugese Tourist Bd. | | | | | | | | | | | | | | • | • | | • | • | | • | | | • | | | | | | | | | | | |

(Continued from Page 59)

lost McDonald's Corp., Mattel Inc. and Rowntree-Mackintosh (U.K.).

Top international executives: O. Milton Gossett, chairman-ceo; Jeremy Sinclair and Alban Lloyd, joint chairmen, Saatchi & Saatchi Compton International; Roy Warman and Terry Bannister, joint chairmen, S&SC International; and Ed Wax, president.#

## Scali, McCabe, Sloves

Scali, McCabe, Sloves, New York (part of the Ogilvy Group), had non-U.S. gross income of $15.1 million in 1986, up 11.8% from 1985. Non-U.S. billings increased 11.4% to $101.1 million. The agency's worldwide gross income reached $77.5 million in 1986, with international accounting for 19.5% of the total. Worldwide billings were $556.6 million, with international accounting for 18.1%.

Scali owns majority or maximum-allowable interest in seven agencies and minority interest in three. In February 1986, Scali purchased a minority interest in Audour Soum, a French agency.

Key international accounts won in 1986 include Ralston Purina Co., Famsa/Daimler Benz, Seguros America, Moulinex (Mexico); London Commodity Exchange, Northern Foods, Orbis, Schwarzkopf, Smith & Nephew, British Telecom (U.K.); Champion, N.A. Decorative, Ralston (Burger Crunch), LaBatt Brewing (Guinness), Lipton (soup, fruit), Cadbury fudge (Canada); *Time*, Pacific Pet Foods, Michigan Bayley (Australia); and Bosch, Loewe, Siemens, Wella (Germany).

Losses included Alberto-Culver Co., (Mexico); Arthur Andersen, Radio Marketing Bureau, Savacenter, Watney (U.K.); Sara Lee Corp. (Canada); Met Transit, State Transit (Australia); and Vitra (Germany).

The top international executive for Scali, McCabe, Sloves is Martin Sloves, chairman-ceo.#

## SSC&B:Lintas Worldwide

SSC&B:Lintas Worldwide, based in London, had 1986 non-U.S. gross income of $168 million, an increase of 18.9% over 1985. Non-U.S. billings rose to $1.2 billion, up almost 20%.

Worldwide gross income was $237 million in 1986, with international contributing 70.8%. Worldwide billings rose to $1.6 billion, with international business 72% of the total.

SSC&B:Lintas, part of the Interpublic Group of Cos., owns majority or maximum-allowable stock in 50 agencies, minority interest in four and has a non-equity affiliation with 15.

More than 90 overseas accounts were added in various countries in 1986, while about 30 were lost.

Top international executives: William Weithas, worldwide chairman-ceo; Kenneth Robbins, chairman-ceo, international; and Spencer Plavoukos, chairman-ceo, U.S.#

## TBWA

TBWA Advertising, New York, had non-U.S. gross income of $50 million in 1986, an increase of 37% over 1985.

Non-U.S. billings increased more than 43%, to $348.8 million. This was attributed both to internal growth and international currency gains.

Worldwide gross income registered $65.7 million in 1986, with non-U.S. business accounting for 76% of total income. During the same period, worldwide billings rose to $453.3 million, with international contributing nearly 77%.

TBWA owns majority or maximum-allowable stock in 12 shops in nine countries, and has non-equity affiliations with seven.

International accounts gained in 1986 included Henkel (Spain); Ralston Purina Co. (U.K.); and Air Plus credit

(Continued on Page 61)

## Saatchi & Saatchi Compton Worldwide

| Clients: | Americas | | | | | | | | | Europe | | | | | | | | | | | | Africa | Middle East | Asia,Pacific | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Brazil* | Canada | Chile* | Peru* | Puerto Rico | Venezuela* | Caribbean | Mexico* | Austria | Belgium* | Denmark* | Finland* | France | Germany | Greece | Italy | Netherlands | Norway | Spain | Sweden* | Switzerland | U.K. | | | Australia | Japan | Hong Kong | Korea* | New Zealand | Philippines | Singapore | Thailand* |
| Procter & Gamble | • | • | • | | • | • | | • | | • | • | | • | • | • | • | • | • | | • | • | • | • | • | • | | | • | | | • | • | |
| Racal | | | • | | | | | | | | | | | | | | | | | | | | • | | | | | | | | | | |
| Ralston Purina | | | | | • | | | • | | | | | | | | • | | | | | | | | | | • | | | • | | | | |
| Reckitt & Colman | • | | | | | | | | | | | | | | | | | | | | | | • | • | • | • | | | | | | | |
| RJR Nabisco | | | • | | | • | | • | | | | | | • | • | | • | • | • | | | • | • | • | • | | | • | • | | | | |
| Sandoz | • | | | | | | | | | • | | | | | • | | | • | | | | • | | | | | | • | | | | | |
| Schering-Plough | • | • | | | | | • | | • | | | | | • | | | | | | | | | | | | | | | | | | | |
| Sterling | • | | • | | | | | • | | | | | | | | | | | | | | | | | | | | | • | | | | |
| Tonka | | | • | | | | | | | | | | | | | | | | | | | | • | | | • | | | • | | | | |

*Non-equity affiliation. Source: Saatchi & Saatchi Compton

## Scali, McCabe, Sloves

| Clients: | Americas | | | Europe | | Asia,Pacific | |
|---|---|---|---|---|---|---|---|
| | USA | Canada | Mexico | U.K. | | Australia | |
| Chase Manhattan | • | • | | • | | | |
| Hertz | • | • | • | | | | |
| Ralston Purina | • | • | • | | | • | |
| Volvo | • | • | | • | | | |

Source: Scali, McCabe, Sloves

## SSC&B:Lintas Worldwide

| Clients: | Americas | | | | | | Europe | | | | | | | | | | | | | | | | South Africa | Other | Asia,Pacific | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Argentina | Brazil | Canada | Chile | Mexico | Austria | Belgium | Denmark | Finland | France | Germany | Greece | Italy | Netherlands | Norway | Portugal | Spain | Sweden | Switzerland | U.K. | | | | Australia | Hong Kong | India | Japan | Philippines | Singapore | Taiwan | Thailand |
| Alfa Romeo | | | | | | | • | • | | | • | • | | | • | | | | • | • | | | | | | | | | | | |
| Arthur de Moss | • | | • | | | | | | | | | | | | | | | | | | • | | | | | | | | | | |
| BAT | | | | | | • | | | | • | | | | | | | | | | | | | | | • | | | | | | |
| Bata | | | | | • | | | | | | | | | | | | | | | | | | | | | • | | | | | |
| Bahlsen | | | | | | | • | | | | • | • | | | | | | | | | | | | | | | • | | | | |
| Bausch & Lomb | | | • | | | | | • | | | | | | | • | | | • | | | | | | | | | | | | | |
| Bayer | | • | | | | | • | | | | | • | | | • | | | | | | | | | | | | • | | | | |
| British Meat | | | | | | | | • | | | • | | | • | • | | | • | | • | | | | | | | • | | | | |
| Canon | | | | | | | | | | | | | | | • | | | | | | | | | | | | | | | | |
| C.C. Friesland | | | | | | | | | | | | | | | | | | | | | | | • | | | • | • | | | | |
| Chefaro | | | • | • | • | • | • | • | • | • | • | • | • | • | • | • | • | | • | • | • | | | • | • | | | | | • | • |
| Citicorp | • | | • | • | | • | | | | | | | • | | | | | • | | | | | | | • | • | • | | • | • | • |
| Citizen | • | | | | | | | | | | | | | | | | | • | | | • | | | | | • | • | | | | | |
| Computer Management Group | | | | | | | | | | | • | | | | • | | | | | | • | | | | | | | | | | |
| Coca-Cola | • | | | • | | • | | | | | | | | | | • | | | | | | | • | • | • | | | | | | • |
| Corning | | | | | | | | | | | • | | | • | | | | | | | | | | | | | • | | | | |
| Curver | | | | | | | | • | | | | • | | | • | | | | | | | | | | | | | | | | |
| Dandy Chewing Gum | | | | | | | | | • | | | | | | | | • | | • | | | | | | | | | | | | |
| Ford/Motorcraft | | | | | | | • | • | • | | • | • | | • | • | | • | • | | • | • | | | | | | | | | | |
| Guinness | | | | | | | | | | | | • | | | | | | • | | | • | | | • | | | | • | | | |
| Heineken | | | | | | | | • | | | | | | | | | | • | | | | | | • | | | | | | | |
| Honda | • | | | | | | | • | | | | | | | | | | | | | | | | | | | | | | | |
| ICI | | | | | | | | | | | | | | | | | | | | | | | | | • | | | | | | • |
| Japan Air Lines | | | | | | | | | | | | | | | | | | | | | | | | | | • | | | • | • | • |
| Johnson & Johnson | • | | • | | | | • | | | | • | • | • | • | | | | • | • | • | • | | | • | | | • | • | | | • |
| Lego | • | | | | | | | | | | | | | | | | | | | • | | | | | | | | | | | • |
| 3M | | | | | • | | | | | | | | | | | | | | | | | | | | | | • | | | | |
| Michelin | | | | • | | | | | | | | | | | • | | | | | | | | | | | | | | • | | |
| Minolta | | | | | | | | | | | | | | | | | • | | | | | | • | | | | | | | | |
| Molnlycke | | | | | | | | | | | • | • | | | | | | | | | • | | | | | | | | | | |
| NEC | | | | • | • | • | | • | • | | • | | | | • | | | | • | | • | | | | | | | | | | |
| Nestle | • | | | • | | • | | • | | | • | • | | | | | | | | • | • | | | | • | • | | | | | |
| Novo Enzymes | • | | • | | | | | | • | | | • | | • | | • | | | | • | • | | • | | | | • | | | | |
| Noxell | • | | | • | | | | | | | • | | | | • | | | | | | • | | | | | • | | | | | |
| Numarco | | | | | | | | • | | | | | • | • | • | | | • | | | | | | | | | | | | | |
| N.Y. State Commerce Dept. | • | | | | | | | | | | | | | | | • | | | | | | • | | | | | • | | | | |
| Philippine Airlines | | | | | | | | | | | | | | | | | | | | | | | | | | | | • | | | |
| Philips | | • | • | | | • | • | • | • | • | • | • | | • | • | | | | • | | • | | | | • | • | | • | | • | |
| Quaker | | | | | | | | | | | | | | | | | | | | | | | | | | • | | • | | | |
| RCA-Columbia | • | | | | | | | • | | | | • | • | | • | • | | | • | | • | | | | | • | | • | | | |
| Reckitt & Colman | | | • | • | | | | | | | | | | | | | | | | | | | | • | | | • | • | | | |

card (pan-European). Accounts lost included Monsanto (U.K.) and Lego (Denmark, U.K.).

TBWA's top international executives include: William Tragos, president-ceo; Claude Bonnange, co-founder, marketing research; Uli Wiesendanger, co-founder, creative; Paolo Ajroldi, co-founder, account management; Richard Costello, president-ceo, U.S.; Martin Denny, chairman, U.K.; David Lake, international financial director; and managers Mike Camesasca (Germany, Switzerland), Alberto Levy (Italy), Jean-Francois Minne (France) and Roland van Kralingen (Netherlands).#

## J. Walter Thompson Co.

J. Walter Thompson, New York, had non-U.S. gross income of $211.3 million in 1986, a 14.8% increase over 1985. Non-U.S. billings rose 12.1% to $1.4 billion. Worldwide gross income was $471 million in 1986, with international business making up nearly 45% of that. World billings were $3.14 billion, with international again contributing 45%. JWT's international network includes 130 agencies in 40 countries.

Major accounts gained in 1986 included Levi Strauss & Co. jeans, Mattel Inc., PepsiCo, Philips (Europe); Bacardi Imports, Beiersdorf, Exxon, IBM Corp. (Latin America); Eastman Kodak Co., Metro Group, Nabisco, Philips, Pepsi Slice, Philipinas Shell (Asia/Pacific); Carling O'Keefe, Schenley Canada (Canada). Accounts lost included Burger King Corp., CPC, Ford Motor Co., Nestle, Warner-Lambert Co. (Europe); Champion, Topper (Latin America); Pure Foods (Asia/Pacific).

Top international executives: Don Johnston, chairman-ceo; Ronald S. Burns, president, Canada; Michael Cooper-Evans, president, Europe; Leonel M. Pavao, president, Latin America; Donald F. Thompson, president, Asia/Pacific.#

## WCRS Group

Wight Collins Rutherford Scott Group, London, had non-U.S. gross income in 1986 of $26.6 million—30.9% of its total gross income of $86.2 million.

The group had non-U.S. billings of $151.8 million, 23% of the total $660.3 million.

WCRS owns majority or maximum-allowable stock in 15 agencies.

WCRS Group, which includes WCRS & Partners, London, experienced rapid international growth in 1986, with the purchase of Della Femina, Travisano & Partners and HBM/Creamer in the U.S.

In February of this year, WCRS bought The Ball Partnership in the Asia/Pacific region from Ogilvy & Mather.

The agency gained the Sheraton hotels account on an international basis in 1986.

It reported no losses.

The agency's principal international executives include: Robin Wight, chairman; Peter Scott, chief executive; Tim Breene, deputy chief executive; and Michael Ball, chairman-ceo, The Ball Partnership.#

## Young & Rubicam

Young & Rubicam, New York, had non-U.S. gross income of $270.3 million in 1986, a 38% increase from $195.4 million in 1985. Non-U.S. billings also increased 38% to $1.8 billion. Worldwide gross income was $628.4 million, of which 43% was international business. Worldwide billings hit nearly $4.2 billion, with international billings accounting for 43%.

The network consists of 33 agencies in 27 countries. Y&R owns majority or maximum-allowable interest in 27 agencies, minority interest in four and has non-equity affiliations with

*(Continued on Page 62)*

## SSC&B:Lintas Worldwide

| Clients: | Americas: USA | Argentina | Brazil | Canada | Chile | Mexico | Europe: Austria | Belgium | Denmark | Finland | France | Germany | Greece | Italy | Netherlands | Norway | Portugal | Spain | Sweden | Switzerland | U.K. | South Africa | Other | Asia,Pacific: Australia | Hong Kong | India | Japan | Philippines | Singapore | Taiwan | Thailand |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Remy Martin | | | | | | | | ● | ● | | | ● | | ● | | | | | | | ● | | | | | | | | ● | | ● |
| R.J. Reynolds | | | | | | | | | | | | | | | | | | | | | | | | | ● | ● | ● | | | | |
| Rowntree Mackintosh | | | | | | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | | | | ● | | | | ● | | ● |
| SEB Tefal | | | | | | | ● | ● | ● | | ● | | | ● | ● | | | | | | | | | | | | | | | | |
| Schering Plough | | | | | | | | | | | | ● | | | | | ● | ● | | | | | | | | | | | | | |
| Sony | | | | | | | | | ● | | | | | | | | | | | | | | | | | ● | | | | | |
| Speedy Muffler | ● | | | ● | | | | | ● | | | | | | | | | | | | | | | | | | | | | | |
| Sterling Drug | ● | ● | ● | ● | ● | ● | | ● | ● | ● | | | | | | | ● | ● | ● | | ● | ● | | ● | | | ● | ● | ● | ● | ● |
| Tetrapak | | ● | | | | | | | | | | | | | | | | ● | | | ● | | | | | | | | | | |
| Timberland | ● | ● | | | | | | | ● | | ● | ● | | | | | ● | | ● | | ● | | | | | | | | | | |
| Toyota | | | | | | | | | ● | | | | | | | | ● | | | | ● | | ● | ● | | | | | | | |
| Unilever | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Wander | | | | | | | | | | | | | | | | | ● | | | | | ● | ● | | | | | ● | ● | | ● |

Source: SSC&B:Lintas Worldwide

## TBWA

| Clients: | Americas: USA | Europe: Austria | Belgium | Denmark | France | Germany | Greece | Italy | Netherlands | Norway | Portugal | Spain | Sweden | Switzerland | U.K. | Asia,Pacific |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| AEG | | ● | | | | ● | | | | | | ● | | ● | | |
| Air Plus | | ● | ● | ● | ● | ● | | ● | ● | ● | | ● | ● | ● | ● | |
| Barilla | | | ● | | ● | ● | | | | | | | | ● | ● | |
| Beiersdorf | | ● | | | ● | ● | | | | | | | | | | |
| BSN Gervais Danone | ● | | ● | | ● | ● | | | | | | | | ● | | |
| Bull Computers | | ● | ● | ● | ● | ● | | | ● | | | | | ● | | |
| CPC International | | | | | | ● | | ● | ● | | | | | | | |
| Dunlop | | ● | | | ● | ● | | | | | | | | | | |
| Evian | ● | | | | | | | | | | | | | ● | ● | |
| Grand Marnier | ● | | | | | ● | | | ● | | | | | | | |
| Grand Met-IDV | ● | | | | | ● | | | ● | | | | | | ● | |
| Henkel | | ● | ● | | ● | ● | | ● | ● | | | ● | | | | |
| Monsanto | ● | | | | ● | ● | | | | | | | | | | |
| Philip Morris | | | ● | | ● | ● | | | ● | | | | | | | |
| Ralston Purina | ● | | | | ● | ● | | ● | | | | ● | | | ● | |
| Samsonite | | ● | ● | ● | ● | ● | | ● | ● | ● | | ● | ● | ● | ● | |
| SEAT Automobiles | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | |

Source: TBWA

## J. Walter Thompson Co.

| Clients: | Americas: USA | Argentina | Brazil | Canada | Chile | Peru | Uruguay | Mexico | Puerto Rico | Venezuela | Europe: Austria | Belgium | Denmark | France | Germany | Italy | Netherlands | Spain | Sweden | Switzerland | UK | Portugal | Greece | Turkey | South Africa | Asia,Pacific: Australia | Japan | Hong Kong | New Zealand | Singapore | Thailand | Philippines | Malaysia |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Allied Breweries | ● | | | ● | | | | | | | | | | | | | ● | ● | | | ● | | | | | | | | | ● | | | |
| Bacardi | | | ● | | | | | ● | | | | ● | ● | | ● | | ● | ● | | | ● | ● | ● | | | | ● | | | | | | |
| Beatrice Foods | ● | ● | | | | | | | ● | | | | | ● | | | | | | | | | | | | ● | | | | | | | |
| Beecham | | | | | ● | | | | | | | | | | | | ● | | | | ● | | | | | | | | | | | | |
| Benetton | ● | | | ● | | | | ● | | | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | | ● | | ● | ● | ● | | | | | | |
| Burger King | ● | | | ● | | | | | | ● | | | | | | | | | | ● | ● | | | | | ● | | | | ● | | | ● |
| Chesebrough-Ponds | | | ● | | ● | ● | | | | ● | | | | | | | | | | | | | | | | | | | | | | | |
| Commodore | | | | | | | | | | | | ● | | ● | | ● | | | ● | ● | | | | | | | | | | | | | |
| DeBeers | | | ● | ● | | | | ● | | | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | | | ● | ● | ● | | | | | | |
| Eli Lilly | ● | | | ● | ● | | | | | | | | | | | ● | | | | | | | | | | | | | | | | | |
| Emery | ● | | | ● | | | | | | | | ● | | | ● | ● | | | ● | ● | ● | | | | | ● | | ● | | | | | |
| Ford | ● | ● | ● | ● | ● | | | ● | ● | ● | ● | ● | ● | ● | | ● | ● | ● | ● | ● | | | ● | ● | | ● | | | | | | |
| Garrett (Signal) | ● | ● | | | | | | | | | | | | ● | ● | | | | | | | | | | | | | | | | | | |
| Gerber | ● | | | | | | | ● | ● | | | | | | | | | | | | | | ● | | ● | | | ● | | | | | |
| Hyatt | ● | | | ● | | | | ● | | | | | | | | | | | | | | | | | | ● | ● | | ● | | | | |
| IBM | | ● | | ● | ● | ● | ● | | | | | | | | | | | | | | | | | ● | | ● | ● | | ● | ● | ● | ● | ● |
| Jacobs Suchard | | | | ● | | | | | | | ● | ● | | ● | ● | | | | | ● | | | | | | | | | | | | | |
| S.C. Johnson | ● | ● | ● | | ● | | ● | ● | ● | ● | ● | | | | ● | ● | | | | | | | | | | | | | ● | ● | ● | ● | |
| Kellogg | ● | ● | ● | ● | ● | | | ● | | ● | ● | ● | | ● | ● | | ● | | | ● | ● | | ● | ● | ● | | ● | ● | | ● | ● | | ● |
| Kodak | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | | ● | | | ● | ● | ● | ● | | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● |
| Kraft | ● | | | ● | | | | ● | ● | ● | | ● | ● | | ● | ● | | ● | ● | | ● | | | | ● | ● | | ● | ● | | ● | ● | ● |
| Lufthansa | | | | | | | | | | | | | | | | | | | | | | | | | | | | ● | | ● | ● | ● | ● |
| Malaysia Airlines | ● | | | | | | | | | | | | | ● | ● | | ● | | | ● | ● | | | | | ● | | ● | | | | ● | ● |
| Mattel | | ● | | | ● | | | ● | ● | | | ● | | ● | ● | ● | | ● | | ● | ● | ● | | | | | | | | | | | |
| McDonnell-Douglas | ● | ● | ● | ● | ● | | ● | ● | | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | | ● | | | ● | | ● | | ● | | | ● |

(Continued from Page 61)

two.

Major international business gained in 1986 included Ford Motor Co. (Germany); Eastman Kodak Co. (Canada, U.K.); Toys "R" Us, British Gas, Legal & General Ltd. (U.K.); Colgate toothpaste, Standa (Italy); and Canada Dry (Canada).

No international accounts were lost in 1986.

Top international executives: Alexander Kroll, chairman; Peter Georgescu, president, Y&R Advertising; John McGarry, exec VP-chairman worldwide client services; Joseph DeDeo, president, Y&R Europe; Nelson Demello, senior VP, area director, Latin America; James McCoubrey, exec VP-area director, Canada/Australia/Africa; Alan Sheldon, exec VP; and Neils Menko, senior VP-director, advertising headquarters.#

## Notes to charts

**Ted Bates Worldwide** also handles global accounts in **Indonesia** (De Beers, Schering-Plough, Tambrands); **Malaysia** (Avis, De Beers, DHL, Electrolux, Lego, Mars, Shelleys Chemical, Tambrands, Thomas Cook, Xerox); and **Nigeria** (DHL, S.C. Johnson).

**BBDO** also handles global accounts in **Argentina** (Apple Computer); Costa Rica (PepsiCo); **El Salvador** (PepsiCo); **Honduras** (PepsiCo); **India** (Nestle); **Malaysia** (Nestle); and **Uruguay** (Nestle).

**Leo Burnett Co.** also handles global accounts in **Brazil** (Bayer/-Miles, Philip Morris); **Dominican Republic** (Kellogg, Philip Morris, PepsiCo); and **Malaysia** (Cathay Pacific, McDonald's, PepsiCo, Procter & Gamble). Additionally, Burnett handles General Motors business (Germany, U.K., U.S.).

**Foote, Cone & Belding** also handles global accounts in **Argentina** (Beiersdorf); **Guatemala** (Beiersdorf, Colgate-Palmolive, RJR/Nabisco); **Jamaica** (Colgate-Palmolive, Hiram Walker); and **Trinidad** (Beiersdorf, Colgate-Palmolive, Nestle, PepsiCo).

**Grey Advertising** also handles global accounts in **New Zealand** (Block Drug Co., Remington).

**McCann-Erickson Worldwide** also handles global accounts in **Barbados** (AHP, Chesebrough-Pond's, Coca-Cola, Dow Chemical, Exxon/Esso, General Motors, Gillette, Goodyear, Johnson & Johnson, L'Oreal, Martini & Rossi, Richardson-Vicks); **Chile** (Black & Decker, Carnation, Casio, Coca-Cola, Dow Chemical, Exxon/Esso, General Motors, Gillette, Goodyear, Heublein, L'Oreal, Martini & Rossi, Nestle, R.J. Reynolds); **Costa Rica** (American Express, AHP, Bayer/-Miles, Black & Decker, Casio, Chesebrough-Pond's, Coca-Cola, CPC, Dow Chemical, Exxon/Esso, Gillette, Goodyear, Johnson & Johnson, L'Oreal, Lufthansa, Nestle, Quaker, Union Carbide); **Dominican Republic** (Bayer/Miles, Carnation, Chesebrough-Pond's, Coca-Cola, Exxon/Esso, General Motors, Nestle); **El Salvador** (AHP, Bayer/Miles, Chesebrough-Pond's, Coca-Cola, Exxon/Esso, General Motors, Gillette, Heublein, Johnson & Johnson, L'Oreal, Lufthansa, Nestle); **Guatemala** (AHP, Bayer/-Miles, Chesebrough-Pond's, Coca-Cola, Exxon/Esso, Gillette, Goodyear, Johnson & Johnson, L'Oreal, Nestle, Union Carbide); **Honduras** (AHP, Bayer/Miles, Beatrice/Hunt Wesson, Chesebrough-Pond's, Coca-Cola, Exxon/Esso, Gillette, Johnson & Johnson, Nestle, Union Carbide); **Jamaica** (Coca-Cola, Exxon/Esso, Gillette, Goodyear, Henkel, Heub-

## J. Walter Thompson Co.

| Clients: | Americas | | | | | | | | | Europe | | | | | | | | | | | | | South Africa | Asia,Pacific | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Argentina | Brazil | Canada | Chile | Peru | Uruguay | Mexico | Puerto Rico | Venezuela | Austria | Belgium | Denmark | France | Germany | Italy | Netherlands | Spain | Sweden | Switzerland | UK | Portugal | Greece | Turkey | | Australia | Japan | Hong Kong | New Zealand | Singapore | Thailand | Philippines | Malaysia |
| Monroe | ● | | | | | | | | | | | | | | ● | ● | | | | | ● | | | | | | | | | | | |
| Nabisco Brands | ● | ● | ● | ● | | ● | ● | ● | | ● | | | | | | | | | | | | | | | | | | ● | | ● | | |
| Northern Telecom | ● | | | ● | | | | | | | | | | | | | | | | | | | | | | | | | ● | | | |
| Nestle | ● | ● | ● | | ● | ● | | ● | ● | | | ● | | | ● | | ● | ● | | | ● | ● | | ● | | | | ● | | ● | | ● |
| Oscar Mayer | ● | | | | | | | | | ● | | | | | | | | ● | | | | | | | | | | | | | | |
| Pepsico | ● | ● | ● | ● | ● | | ● | | | | | ● | | | ● | ● | | ● | | | | ● | ● | | | | ● | ● | | | ● | |
| Philips | | | ● | | ● | ● | | | | ● | | ● | | | | | ● | | | | ● | ● | ● | | | ● | | ● | | | | |
| Quaker Oats | ● | | | | | | | ● | | ● | | | | | | | | | | | ● | ● | | | | ● | | | | | | |
| RHM | | | | | | | | | | | | | | ● | ● | | | | | | ● | | | | | | | | | | | |
| R.J. Reynolds | | | ● | ● | | ● | | ● | ● | | | ● | | ● | ● | | ● | ● | | ● | | | ● | ● | | | | ● | ● | | | | ● |
| Reckitt & Colman | | | ● | | | | | | ● | | | | | | | | | | | | | ● | | | ● | | | | | | | |
| Rolex | ● | ● | ● | ● | | | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | ● | ● | | | | ● | ● | ● | | | ● | |
| Scott Paper Co. | ● | ● | | ● | | | | | | | | | | | | | | ● | | | ● | ● | | | | ● | | | | ● | ● | | ● |
| Unilever | ● | ● | ● | ● | ● | ● | ● | | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Warner Lambert | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | | ● | | ● | ● | ● | | | | ● | ● |

Source: J. Walter Thompson Co.

## WCRS Group

| Clients: | Americas | Europe | | | | | | | | | | | | Africa | Middle East | Asia,Pacific | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Belgium | Denmark | France | Germany | Italy | Netherlands | Norway | Portugal | Sweden | Switzerland | U.K. | | | | Australia | Hong Kong | Malaysia | Singapore | Thailand | |
| Laura Ashley | ● | | | ● | ● | | ● | | | | | ● | | | | | | | | | |
| British American Tobacco | | | | | | | | | | | | | | | | | ● | ● | ● | | |
| Remy Martin | | | | | | | | | | | | | | | | | ● | ● | ● | | |
| Seagram | | | | | | | | | | | | | | | | ● | | ● | ● | ● | |
| Sheraton | ● | ● | ● | ● | ● | ● | | ● | ● | ● | ● | ● | | | ● | ● | | | | | |

Source: WCRS Group

## Young & Rubicam

| Clients: | Americas | | | | | | | | | Europe | | | | | | | | | | | | | | Africa | Asia,Pacific | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | USA | Argentina | Brazil | Canada | Chile | Mexico | Peru | Puerto Rico | Uruguay | Austria | Belgium | Denmark | France | Germany | Italy | Netherlands | Norway | Spain | Sweden | Switzerland | U.K. | | | | Australia | Hong Kong | Japan | Malaysia | New Zealand | Singapore | Thailand |
| Adidas | ● | ● | ● | ● | ● | ● | | | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | | ● | ● | ● | ● | ● | ● | ● | ● |
| Air Canada | | | | | | | | | | | | | ● | ● | | | | | | ● | ● | | | | | | ● | | | ● | |
| American Home Prods. | ● | | ● | ● | | | | ● | | | | | | ● | ● | | | | | ● | ● | | | | | | ● | | | | |
| AT&T | ● | | | ● | | | | | | | | | ● | ● | ● | | | | | | | | | | | | ● | | | | |
| Bosch | | | | | | | | | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | | | | | | | | | | |
| BSN | ● | | ● | | | ● | | | | | ● | | ● | | ● | | | | ● | | ● | | | | | | ● | | | | |
| Canada Dry | | | | ● | ● | ● | | | | | ● | | | | | | | | | | | | | | | | ● | | | | |
| Colgate-Palmolive | ● | ● | ● | ● | | ● | | ● | | ● | ● | ● | ● | ● | ● | ● | | ● | ● | ● | ● | | | ● | ● | ● | ● | ● | ● | ● | ● |
| Du Pont | ● | ● | ● | | | ● | | | | | ● | | ● | ● | ● | | | ● | | ● | ● | | | ● | ● | ● | ● | | | ● | ● |
| Eastman-Kodak | ● | ● | | ● | | | | ● | | ● | ● | ● | ● | ● | | ● | ● | | | ● | ● | | | | | | ● | | | | |
| Ford | ● | | ● | | | | | | | | | | | ● | | | | | | | | | | ● | | | | | | | |
| Frito Lay | | | ● | ● | | ● | | ● | | | | | | | | | | | | | | | | | | | | | | | |
| General Foods | ● | | ● | ● | | ● | | ● | | ● | | ● | ● | ● | ● | ● | | ● | ● | ● | ● | | | | | | ● | | | | |
| H.J.Heinz | | | | | | | | | | | ● | | ● | | | ● | | | | | ● | | | ● | ● | | | | | | |
| Hong Kong Tourist Assn. | | | | | | | | | | | | | ● | | | | | | | | ● | | | | ● | ● | ● | ● | | ● | ● |
| IVECO | | ● | | | | | | | | ● | | ● | | | | | ● | ● | ● | ● | | | | | | | | | | | |
| Jamaica Tourist Board | ● | | | ● | | | | | | | | | | | | | | | | | ● | | | | | | | | | | |
| Johnnie Walker | | | | | | | | | | | | | | | | | | | | ● | ● | | | | | | | | | ● | |
| Johnson & Johnson | ● | ● | ● | ● | ● | ● | | ● | | ● | | | | | ● | | | ● | | | | | | ● | | | ● | | | ● | |
| Kentucky Fried Chicken | ● | ● | | ● | | ● | | ● | | | | | | | | | | | | | ● | | | | ● | | | | | | |
| Pernod-Ricard | ● | | ● | ● | | | | | | | | ● | | ● | | ● | | | | ● | ● | | | | | | | | | ● | |
| Royal Canadian Mint | | | | ● | | | | | | | | ● | | | ● | | | | | | | | | | | | ● | | | | |
| Suchard | | ● | ● | | | | | | | ● | | | ● | ● | | | | ● | | ● | | | | | | | | | | | |
| Time Inc. | ● | | ● | ● | | | | | | | | | ● | | ● | | | | | | ● | | | | | ● | ● | | | ● | |
| United Brands | | | | | | | | | | ● | ● | ● | | ● | ● | | ● | | ● | ● | | | | | | | | | | | |
| Walt Disney | ● | | | ● | | ● | | ● | | | | | ● | ● | | | | | | | ● | | | | | | | | | | |
| Warner-Lambert | ● | | | | ● | | | | | | | | | | | | | | | | | | | ● | | | | | | | |
| Xerox | ● | | | | | | | | | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● | | | | | | | | | | |

Source: Young & Rubicam

The 1987 International Agency/Client Report was prepared by Mark Rosati, assistant international editor; Ann Keeton, free-lance writer; Carol Septow, graphics designer; and Ilse Cermak, international copy editor.

Some agencies declined to cooperate in providing certain information for the charts or agency summaries. In such cases, ADVERTISING AGE collected the data from its correspondents and asked those agencies to comment.

New or merged agencies added to the global roster this year: DDB Needham, Mojo MDA and WCRS.#

lein, Johnson & Johnson, L'Oreal, Nestle, Richardson-Vicks); **Panama** (American Express, Bayer/Miles, Beatrice/Hunt Wesson, Black & Decker, Carnation, Chesebrough-Pond's, Coca-Cola, Exxon/Esso, Gillette, Johnson & Johnson, Nestle, Union Carbide); **Puerto Rico** (Black & Decker, Chesebrough-Pond's, Coca-Cola, Del Monte, Exxon/Esso, General Motors, Gillette, Heublein, L'Oreal, Nestle, R.J. Reynolds, Texas Instruments); **Trinidad** (Coca-Cola, CPC, General Motors, Gillette, Goodyear, Heublein, Johnson & Johnson, L'Oreal, Lockheed, Martini & Rossi, RJR Nabisco, Quaker, Richardson-Vicks); **Turkey** (Bayer/Miles, Coca-Cola, Goodyear, Henkel, Nestle, R.J. Reynolds); and **New Zealand** (Black & Decker, Chesebrough-Pond's, Coca-Cola, Gillette, Goodyear, Levi Strauss & Co., Lockheed, Martini & Rossi, Nestle and Reckitt & Colman). Also, the agency's non-equity affiliate in **Indonesia** handles global accounts (Carnation, Coca-Cola, General Motors, Goodyear, L'Oreal, Lockheed and Nestle).

**Ogilvy & Mather Worldwide** also handles global accounts in **Colombia** (American Express, Chesebrough-Pond's, NutraSweet, Philips, Polaroid, Unilever); **Malaysia** (American Express, Bayer, Beecham, Boeing, General Foods, Guinness, Kimberly-Clark, Korean Air, Mattel, Nestle, Parker Pen, PepsiCo, Philips, Polaroid, Shell, Unilever, Warner-Lambert); **New Zealand** (American Express, Beecham, BMW, British Tourist Authority, Duracell, Guinness, Johnson & Johnson, NutraSweet, Polaroid, Seagram, Shell, Unilever); **Portugal** (Mattel, Philips, Polaroid, Seagram, Shell, Unilever); **Taiwan** (American Express, BAT, Beecham, BMW, Boeing, Duracell, General Foods, Johnson & Johnson, Kimberly-Clark, Korean Air, Mattel, PepsiCo, Philips, Polaroid, Warner-Lambert); and **Turkey** (BAT, Mercedes-Benz, Parker Pen, Philips, Polaroid, Unilever).

In addition, non-equity affiliates handle global accounts in **Korea** (Bayer, Chesebrough-Pond's, Kimberly-Clark, Korean Air, Shell, Unilever) and **Indonesia** (American Express, BAT, Beecham, General Foods, Guinness, Johnson & Johnson, Korean Air, Parker Pen, PepsiCo, Philips, Polaroid, Unilever, Warner-Lambert).

Also, O&M served 11 other clients on a multinational basis under the criteria of this survey—*i.e.*, in at least three countries and worth at least $3 million. These clients could not be included on the chart because information about them was provided after deadline.

**Saatchi & Saatchi Compton Worldwide** also handles global accounts in **India** (Allied Lyons, Fuji); **Malaysia** (British Airways, Procter & Gamble, Malaysian Tourist Board); and **Taiwan** (Beecham, Citicorp, PepsiCo).

For space purposes, Saatchi & Saatchi listed only those clients that it served in five or more countries. The agency says it serves at least 15 other clients on an international basis under the criteria of this survey.

**SSC&B:Lintas Worldwide** also handles global accounts in **Indonesia** (Citicorp, Heineken, ICI, Quaker, Schering-Plough, Sterling Drug, Unilever, Wander); **Malaysia** (BAT, C.C. Friesland, Citicorp, ICI, Johnson & Johnson, Quaker, Sterling Drug, Unilever, Wander); **New Zealand** (Bata, Citicorp, Coca-Cola, NEC, Philips, RCA-Columbia, Sterling Drug, Unilever); and **Pakistan** (BAT, Bayer, ICI, Philips, Unilever).

## Agency/client Summary

| Clients: | N W Ayer | Ted Bates Worldwide | BBDO International | Bozell, Jacobs, Kenyon & Eckhardt | Leo Burnett Co. | DDB Needham | DFS Dorland Worldwide | DMB&B | DYR | Eurocom Group | Foote, Cone & Belding | GGK | Grey Advertising | Hakuhodo Inc. | HCM | Lowe International | McCann-Erickson Worldwide | Mojo MDA Group | Ogilvy & Mather Worldwide | Publicis International | Roux, Seguela, Cayzac & Goudard | Saatchi & Saatchi Compton Worldwide | Scali, McCabe & Sloves | SSC&B:Lintas | TBWA Advertising | J. Walter Thompson Co. | WCRS Group | Young & Rubicam |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| American Brands | | | | | | | | | | | | | | | | | | | | | | • | | | | | | |
| American Cyanamid | | • | | | | | • | • | | | • | | | | | | | | | | | | | | | | | |
| American Express | | | | | | | | | | | | | | | | | • | | • | | | | | | | | | |
| American Home Products | | | | | | | | • | | | | | | | | | • | | | | | • | | | | | | • |
| BAT | | • | | | | • | | | | | | | • | | | | | | • | | | | | • | | | | |
| Bayer/Miles | | | • | | • | | | • | | | | | • | | | | • | | • | | | | | • | | | • | |
| Beatrice Cos. | | | | | • | | | • | | | | | | | | | • | | | | | | | | | • | | |
| Beecham | | | | | • | | | | | | | | • | | | | | | • | | | • | | | | | | |
| Beiersdorf | | | | | | | | | | | • | • | | | | | | | | | | | | | • | | | |
| BMW | | • | | | | | | | | | | | | | | | | | • | | | | | | | | | |
| Bristol-Myers | • | | | | | • | | • | | | | | • | | | | | | | | | • | | | | | | |
| BSN Gervais-Danone | | | | | | | | | | | | | • | | • | | | | | | | • | | | | | | • |
| Chesebrough-Pond's | | | • | | | | | | | | | | | | | | • | | • | | | | | | | • | | |
| Ciba-Geigy | | | | | | | | • | | | • | | | | | | | | | | | | | | | | | |
| Citibank | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Citicorp | | | | | | | | • | | | • | | | | | | | | | | | • | | • | | | | |
| Coca-Cola Co. | | | | | | | | | | | | | | | | | • | | | | | | | • | | | | |
| Colgate-Palmolive Co. | | | | | | | | | • | | • | | | | | | | | | | | | | | | | | • |
| CPC International | | | | | | | • | | | | | | | | | | • | | | | | | | | • | | | |
| Dow Chemical Co. | | | | | | | | • | | | | | | | • | | • | | | | | | | | | | | |
| Du Pont | • | | • | | | | | | | | | | | | • | | | | | | | • | | | | | | • |
| Duracell | | | | | | | • | | | | | | | | | | | | • | | | | | | | | | |
| Eastman Kodak Co. | | | | | | | | | | | | | | | | | | | | | | | | | | | | • |
| Electrolux | | • | | | | | | | | | | | • | | | • | | | | | | | | | | | | |
| Frito-Lay | | | • | | | | | | | | | | | | | | | | | | | | | | | | | • |
| General Foods | | | | | | | | • | | | | | • | | | | | | • | | | | | | | | | • |
| General Motors | • | | | | • | | | • | | | | | | | | • | • | | | | | | | | | | | |
| Gillette Co. | • | | • | | | | | | | | • | | | | | | • | | | | | • | | | | | | |
| Guinness | | | | | | | | • | | | | | | | | | | | • | | | | | • | | | | |
| H.J. Heinz | | | | | • | • | | • | | | | | | | | | | | | | | | | | | | | • |
| Henkel AG | | | • | | | | | | | | | • | • | | • | • | • | | | | | | | | • | | | |
| Hewlett Packard | | | | | • | | • | | | | | | | | | | | | | | | | | | | | | |
| Heublein | | | | | | | | | | | | • | | | | • | • | | | | | | | | | | | |
| IBM | | | | | | • | | | | | | | | | | | | | | | | | | | | • | | |
| Jacobs Suchard | | | | | | | | | | | | | | | • | | | | | | • | | | | | • | | • |
| Johnson & Johnson | | | • | | | | | | | | | | • | | | | • | | • | | | • | | • | | | | • |
| S.C. Johnson & Son | | • | • | | | • | | • | | | • | | | | | | | | | | | | | | | • | | |
| Kimberly-Clark | | | | | | | | • | | | • | | | | | | | | • | | | | | | | | | |
| Kraft | | | | | • | | | | | | • | | | | | | | | | | | | | | | | | |
| Mars | | • | | | • | | | • | | | | | • | | | | | | | | | | | | | | | |
| Philip Morris Inc. | | | | | • | | | | | | | | | | | | | | | | | | | | | • | | |
| 3M | | • | | | | | | | | | | | • | | • | | | | | | | | | • | | | | |
| Polaroid | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| RJR/Nabisco | | | | | | | | | | | • | | | | | | • | | | | | • | | | | • | | |
| Nestle Foods | | | • | • | | | | | | | • | | | | | | • | | • | • | | | | • | | • | | |
| L'Oreal | | | | | | | | | | • | | | | | • | | • | | | • | | | | | | | | |
| Parker Pen | | | | | | | | | | | | | | | | • | | | • | | | | | | | | | |
| PepsiCo | | | • | | • | | | | | | • | | | | | | | | • | | | • | | | | • | | |
| N.V. Philips | | | • | | | | | | | | | | | | | | | | • | • | | • | | • | | • | | |
| Procter & Gamble | | | | | • | | | • | | | | | • | | | | | | | | | • | | | | | | |
| Qantas | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Quaker Oats Co. | | | | | | • | | | | | | | | | | | • | | | | | | | • | | • | | |
| Reckitt & Colman | | | | | | • | | | | | | | | | | | • | | | | | • | | | | • | | |
| Remy Martin | | | | | | | | | | | | | | | | | | | | | | | | • | | | • | |
| Richardson-Vicks | | | | | | | | • | | | | | | | | | • | | | | | | | | | | | |
| Rothmans | • | | • | | | | | | | | | | • | | | | | | | | | | | | | | | |
| Rowntree-Mackintosh | | | | | | | | | | | | | | | | | | | | | | | | • | | | | |
| Seagram | | | | | | • | | | | | | | • | | | | | | • | | | | | | | | | |
| Shell | | • | | | | | | | | | | | • | | | | | | • | | | | | | | | | |
| Unilever | | | • | | | | | | | | | | | | | • | • | | • | | | | | • | | • | | |
| Union Carbide | | • | | | | | | | | | | | | | | | • | | | | | | | | | | | |
| Warner-Lambert Co. | | • | | | • | | | | | | | | | | | | | | • | | | | | | | • | | • |
| Xerox | | • | | | | | | | | | | | | | | | | | • | | | | | | | | | • |

Source: Compiled by Advertising Age. Does not include all clients listed in individual agency charts.

# Questions linger after mergers

By STEWART ALTER

Events of the past 18 months, culminating in London-based WPP Group's recent agreement to purchase JWT Group, point to a very obvious conclusion: internationalization has restructured the advertising agency business with fury and speed.

For those who still doubt, consider the following two lists.

One is of agencies that, primarily reflecting a need to expand their international capabilities, have felt the need to sell or merge.

Most are private agencies that were unable to accomplish the expansion with their own resources, including Needham Harper Worldwide (now Omnicom Group's DDB Needham Worldwide); Dancer Fitzgerald Sample and Backer & Spielvogel (both owned by Saatchi & Saatchi); Leber Katz Partners (now a part of Foote, Cone & Belding); HBM/Creamer (purchased by WCRS Group); Bozell & Jacobs (sold to Lorimar Telepictures Corp., merged with Kenyon & Eckhardt and now being spun off again); and Benton & Bowles (merged with D'Arcy MacManus Masius).

Public agencies such as BBDO and Doyle Dane Bernbach also saw the need for more resources in place.

The second list reflects the internationalization of agencies from another perspective: ownership.

The declining U.S. dollar and the enthusiasm of the London Stock Exchange for the value of British ad agencies have made many U.S. agencies attractive buys.

Besides WPP Group's purchase of JWT, there is Saatchi's acquisition of DFS, Backer & Spielvogel and Ted Bates Worldwide; WCRS' purchases of Della Femina, Travisano & Partners and HBM/Creamer; and Boase Massimi Pollitt's buy of Ammirati & Puris.

Also, the entry of Mojo MDA of Australia and Roux, Seguela, Cayzac & Goudard of France into the U.S. market indicate that the British won't be the only influences.

**NEWS ANALYSIS**

While it may be growing sophistication in looking at world markets that explains the massive restructuring in the agency business, the impact so far appears to be more on how agencies think about strategy for themselves than for their clients.

Strategy clearly came to the ad agency business in a big way in April and May 1986, when Saatchi & Saatchi Co. fulfilled its long-publicized plan of becoming the largest agency holding company in the world, with its huge cash purchase of Ted Bates Worldwide, and when three sterling agency names—BBDO, DDB and Needham—joined in an unprecedented three-way merger to form Omnicom.

The mergers at first generated excitement, stemming not just from the names or size of the agencies involved. There was a sense that a major statement had been made. Agencies could take their fate into their own hands and not be totally at the mercy of a lower-paying client world.

But a year later, it all seems fuzzier; the acquisitions appear to be more about financial than marketing leverage.

The big risk in the new buy-and-sell environment is that while agencies can be acquired as companies, they really operate more like brand businesses. Therefore, consistency of image and quality of product, which are built by corporate culture, seem essential to the agency "brand promise" as a problem-solver. This is what keeps existing clients and attracts new ones.

Agencies can't be faulted for thinking of their own business; certainly, JWT's failure to is one of the reasons it became so vulnerable. But the critical issue is whether any of the individual operating agencies involved has achieved any greater competitive advantage.

The internationalization of the agency business, to be effective, still must show that it is but a means to a greater end: namely, giving clients greater leverage across worldwide consumer markets.

For coupled with agencies' internationalization is the realization that successful global marketing is not just extending the same program everywhere but doing the same spadework everywhere.

Even the success of Coca-Cola Co.—often cited as the model in global advertising—with one message everywhere is "deceptive," according to Barry Day, vice chairman of Coca-Cola agency McCann-Erickson Worldwide.

Speaking at the recent Third World Advertising Congress-Beijing '87, Mr. Day offered some words of caution.

The "complexity of advertising in the real global world as opposed to the theoretical world of the textbooks" requires taking "into account the genuine differences of nuance, the genuine variations of cultural behavior before you create the pattern of advertising concepts—variations that may even indicate you can't do it," Mr. Day said.#